



THE BOSTON PRODUCE MARKET AND ENVIRONS  
AN ANALYSIS OF FORM AND ACTIVITY  
WITH A PROPOSED SYNTHESIS

by

HARRY E. MOUL

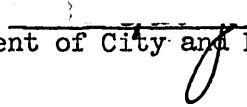
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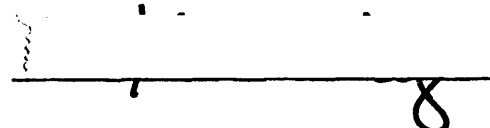
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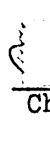
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Submitted to the Department of City and Regional Planning on May 21, 1960, in partial fulfillment of the requirements for the degree of Master in City Planning.

This thesis proposes a plan for the conservation and partial redevelopment of the area approximately described by North Street, Dock Square, India Street and the waterfront. The outline of this area is roughly contiguous with the original harbor line of Boston's Great Cove. This is also the area where Boston's Produce Market has traditionally been located. The analysis portion of this thesis investigates the activities of the Produce Market and concludes that some modified market will survive for many more years in the present location. Other feasible uses for this area, including the waterfront, are also investigated.

The topography and boundary conditions of the area were studied and the dominant architectural character and principal organizational elements are identified.

The end result is a synthesis of form and activity which would help to realize a number of stated objectives.

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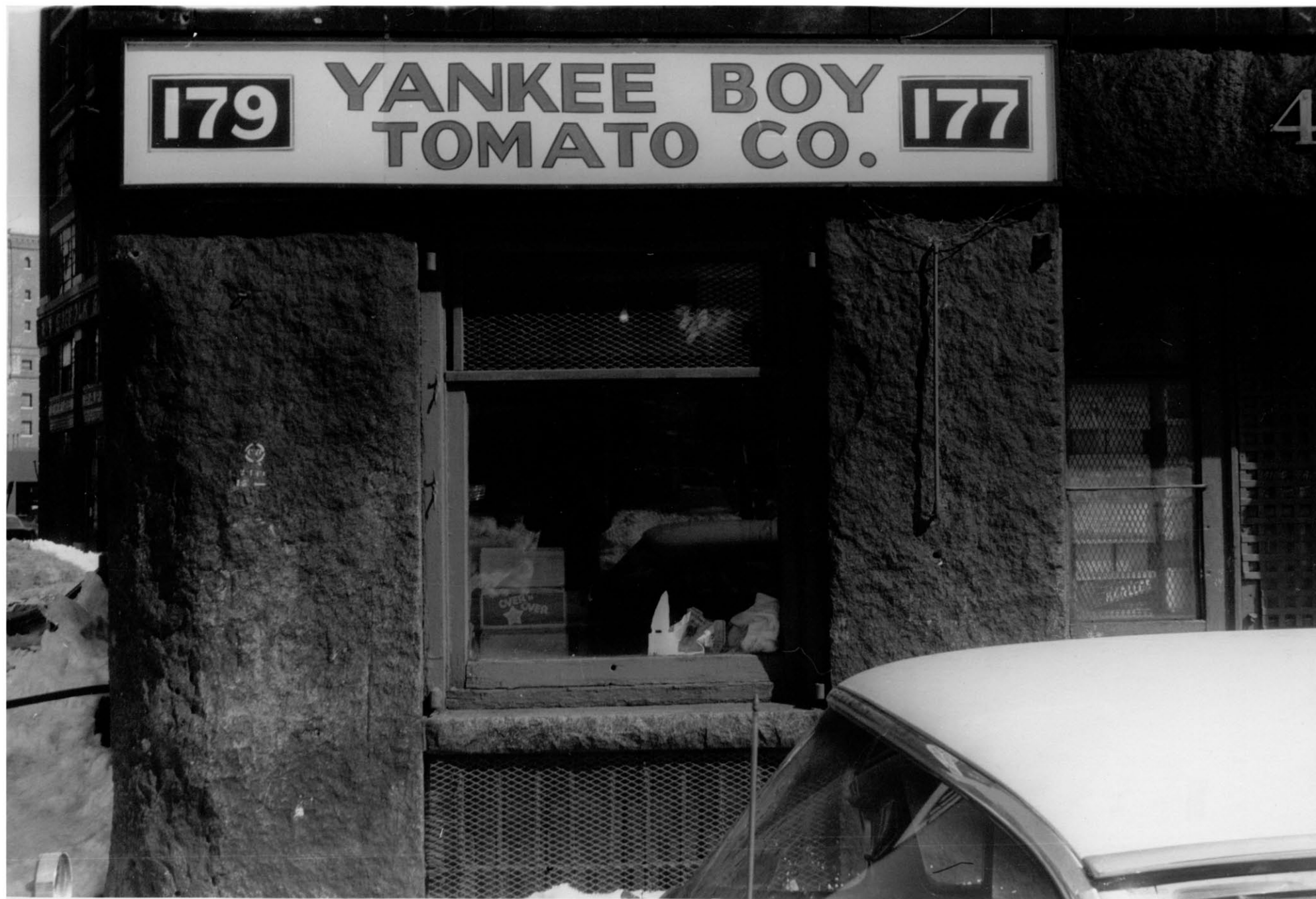
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## I. DESCRIPTION. SPATIAL BREAKDOWN. FOOD MARKETING FACILITIES. BOSTON.

There are four main concentrations of wholesale food dealers in Boston. The locations and commodities handled are as follows: the wholesale meat houses at New Market Square and vicinity; the wholesale fish dealers on Fish Pier; the Boston Market Terminal or Produce Terminal for fresh fruits and vegetables; and the so-called Faneuil Hall Market Area which includes wholesale dealers in all types of commodities. In addition to these areas, there are three specialty markets which supplement the above concentrations. There is a special potato market in the Boston and Maine Railroad yards in Charlestown and watermelons are sold from the cars in the New York, New Haven and Hartford Railroad yards in South Boston. Also, some of the fresh fruit received in Boston is distributed by the Fruit Auction located just off Northern Avenue in the New York, New Haven and Hartford Railroad yards in South Boston. (See Figure 1.) The principal line of enquiry here is meant to lead to some conclusions as to the relative importance of these various areas, their interrelation, and especially the role played by the Faneuil Hall Market Area in relation to the others; its stability and expectations.

The Faneuil Hall Market Area is viewed by many, even within the trade itself, as an archaic survival. It does seem strange that an activity could exist in the same physical environment for two hundred years that have been characterized by startling technological change. The first Faneuil Hall Market was built in 1742 by one Peter Faneuil of Boston who had a difficult time giving the building to the city of Boston. The city accepted only after Peter Faneuil agreed to include



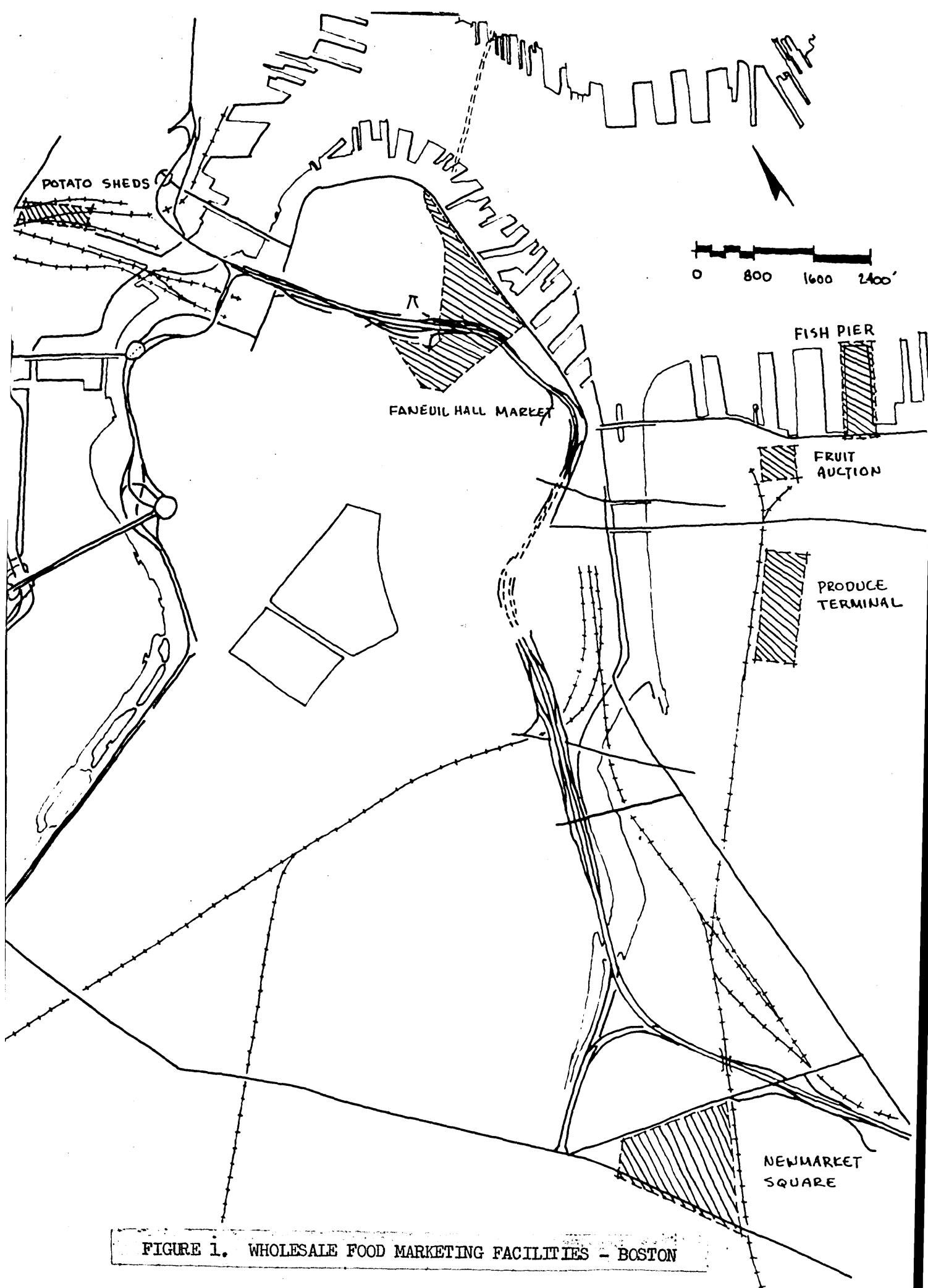


FIGURE 1. WHOLESALE FOOD MARKETING FACILITIES - BOSTON

a public meeting place in his new market building. During the first hundred and fifty years, the market area was able to adapt, if not to a changing technology, at least to a growing population, by expanding into new buildings on filled land along the waterfront. In 1826 Mayor Quincy caused the Quincy Market building to be built, partially on filled land, and the two flanking warehouses on either side were built at the same time. Congestion and a lack of adequate facilities were apparently recurring problems.

During the twentieth century, the market began to adapt itself to changing methods of transportation and an increased demand for space by seeking new locations. This was the beginning of a separation of the market by commodities. The fish market had traditionally been located on T Wharf. In 1910, the Commonwealth of Massachusetts constructed the Fish Pier in South Boston. At that time, most of the dealers moved to the new location. Some stayed behind on Atlantic Avenue and they (or others) are still there.

The history of the Fruit Auction indicates the efforts which that particular enterprise has made to remain in an advantageous location. Originally known as H. Harris and Company, their first location was on Central Wharf in 1847. That location was convenient to the waterfront where the majority of fruit was unloaded. Sales were made right on the docks. However, by 1914, shipping had declined in favor of rail delivery of fresh fruits and H. Harris and Company moved their sales activities to the Boston and Maine Railroad Yards in Charlestown. In 1953, they were to move once more; this time to the New York, New Haven and Hartford Yards in South Boston near the Boston Terminal

Market.

The Boston Terminal Market was established in South Boston in 1926 in facilities leased from the New York, New Haven and Hartford Railroad. The original operations of the terminal were handled by about fifty receivers of fruit and produce. The three market buildings which housed these operations were purchased outright in 1952 by the Boston Terminal Market Corporation. In 1953, truck deliveries were allowed for the first time at the terminal <sup>1</sup>.

The latest example of a segment of the market separating itself was given by the wholesale meat dealers who moved to New Market Square in 1952-53 at the time of the construction of the Central Artery through the Faneuil Hall Market Area. Again, the New Haven Railroad played a part by underwriting the new construction and taking up the mortgage. Undoubtedly, the 1950 Report by the U. S. Department of Agriculture <sup>2</sup>, which had recommended sites in that vicinity for the relocation of the entire meat and produce market, helped to prepare opinion for this move. The majority of meat received in Boston is now handled by dealers in New Market Square and vicinity.

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1. Most of the above discussion is a summary of information contained in a series of 4 pamphlets published by the New England Extension Services' Marketing Education Program and the Cooperative Extension Services of Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, and Connecticut. The Boston Market  
1. The Produce Terminal. 2. The Faneuil Hall Market. 3. The Fruit Auction. 4. The Wholesale Egg Market.
  2. The Wholesale Produce Markets at Boston, Mass. U. S. Department of Agriculture, Production and Marketing Administration, Marketing and Facilities Research Branch, Washington D.C., June, 1950.

## II. TRENDS IN FOOD MARKETING. PROCEDURES AND TECHNOLOGY

To the observer walking about Faneuil Hall or through the long aisle of Quincy Market, the market stalls, aided by the granite and brick buildings, themselves survivals of a more gracious era of architectural style, give the impression of something inherited from the past, which is somewhat out of place in the modern city. This quality certainly has not gone unnoticed. The market areas of the older cities of this country have provided the inspiration for quite a large literary output. The markets have fired the imaginations of governmental agencies, agricultural economists, transportation consultants, chambers of Commerce, Urban Renewal enthusiasts, and students of city planning. They have provided fertile ground for the germination of studies and reports <sup>3</sup>. But, however stimulating these archaic market areas may be to the literary productivity of our expanding white collar classes, there may be serious obsolescence which counteracts this benefit.

Changes in transportation technology are most often evoked in explanations of obsolescence of this sort. The decline of water-borne transport of perishable foods in favor of rail freight has already been mentioned in relation to the various locations of the fruit auction and the creation of the Produce Terminal. This shift has been further emphasized by the decline of the Port of Boston. For example,

bananas are now unloaded at southern ports and arrive in Boston by

3. See "Rumblings in the Belly of Paris" - an article in the January 21, 1960 issue of The Reporter describing the market areas of Paris, "Les Halles" and the pressure to remove them from the location which they have occupied since 1137.

- The New York Times has recently carried articles concerned with plans for the removal of the Fulton Fish Market (Sunday Magazine Section, January 30, 1960) and the Washington Produce Market (February 22) from Manhattan Island.

rail.

A change in production methods may also tend to shift emphasis to or from one means of transportation. For example, the decline in local production of beef due to the closing of local stockyards and slaughterhouses has made the wholesale meat dealers more dependent on rail access than ever before. However, the opposite effect can be noticed in relation to fruits and vegetables where the increase of truck hauling, even from California and Florida, has tended to de-emphasize the importance of rail access. Note the decline of rail receipts at the Produce Terminal (Table V, Appendix A). In another example, when Boston claimed to have the busiest fish pier in the world, and rail freight was the principal method of distribution, the location requirements were fairly simple and determinate. However, for many years fish landings at Boston have been declining. Now many fish that were landed at Gloucester or Portland or even in Canada are brought to Boston by truck for sale and distribution. The decline in local production has made a waterfront location for wholesale fish dealers and processors less imperative. Also, today fish are distributed primarily by truck which allows a further freedom of location. However, marketing patterns often remain very strong despite the decline of their original reason for existing in a given location. The Fulton Fish Market in New York has remained on the lower east side of Manhattan despite the almost absolute absence of local landings.

The effect of technology is felt in another way which may be expressed as an increased mastery of horizontal space in relation to

vertical space. Perhaps this simply amounts to the statement that the elevator was invented before the automobile. In any event, the ease with which commodities may be moved horizontally by means of fork lifts or carts or rails renders much vertical storage space obsolete. Although rotary belts make it easier to convey goods up or down a single flight of stairs, the modern concept of handling wholesale commodities usually involves an unobstructed one-floor layout with the floor at truck-bed or car-bed level. This same effect can be noted in the difficulty of adapting the structures which housed the New England textile industry of a hundred years ago for modern manufacturing uses.

Other innovations which have affected the wholesale food market in a radical way have been in methods of merchandising and distribution of food. The standardization of product, especially in so-called dry grocery products, has been accompanied by a standardization of price. The combination of the two has allowed many steps in the traditional flow of foodstuffs to be combined. (See Diagram I.) The complex price-setting mechanism of the marketplace can be bypassed due to the standardization of product. In its place, time and money must be spent to create a favorable image of the product and to educate consumer demand.

The end result seems to be the introduction of principally three trends in food distribution. One would be the combination of producer and wholesaler in regional wholesale-distributors of brand-name products; another the increase of direct shipment from producer to retailer or restaurant or institution, and a third the rise of the

DIAGRAM I. THE MARKETING CHAIN FOR FRUITS AND VEGETABLES <sup>1</sup>

PRODUCER	SHIPPERS PACKERS	CARLOT AND TRUCKLOT BROKERS AND WHOLESALE RECEIVERS	LESS THAN CARLOT BROKERS AND JOBBERS	RETAILERS	CONSUMERS
GROWERS	Brokers Sales Agencies Market Representatives Chain Store Buyers Commission House Buyers	Terminal Brokers Auction Receivers Commission Merchants Chain Store Warehouses	Less than Carlot Brokers Wholesale Distributors Hotel, Restaurant and Institutional Suppliers	Chain Stores Independent Retail Stores Hotel, Restaurant and Institutional Suppliers	Individual and Institutional Consumers

#### GLOSSARY

Receivers - firms at terminal market which receive or buy in carlot and trucklot sizes

Commission Merchants - firms which sell produce on a commission basis

Brokers - may be buying or selling brokers, representing either absent seller or absent buyer in the market

Jobbers - buy from the receivers and sell and distribute in smaller lots to retailers

Institutional Suppliers - firms which assemble and supply produce to hotels, restaurants, and institutions

1. Adapted from The Boston Market - a series of 4 reports by the Cooperative Extension Services of Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut... and the New England Extension Services' Marketing Education Program.

super-retailer - the chain store. While the latter is probably the most significant as far as inroads on the food market are concerned, the success of any of the three is dependent on the degree to which items can be delivered with dependable consistency of quality.

Frozen foods have allowed a more direct handling of many vegetables because of the uniformity and non-perishable nature of the product. Prepackaging at the point of shipment has, to some extent, also allowed the elimination of some of the traditional marketing steps.

Frederick E. Cole in his report Trends in Food Marketing and Their Importance to New England<sup>4</sup>, delineates this trend towards the combination of market functions (i.e., shipper, receiver, wholesaler, jobber, broker, etc.). Of direct shipment (shipping point directly to retailer) of fruits and vegetables, Mr. Cole estimates that it may account already for over 60 per cent of the total on a national basis and may in the future account for as high as 70 per cent of all shipments of fruits and vegetables.

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4. Trends in Food Marketing and Their Importance to New England, Frederick E. Cole, Extension Marketing Specialist, Dept. of Agricultural Economics, University of Massachusetts; Co-sponsors - The University of Massachusetts and the Federal Reserve Bank of Boston.



### III. CONTINUING ROLE FOR THE TRADITIONAL MARKET

Nevertheless, the wholesale produce market is expected to continue to play an important role in food distribution. The chain stores still supplement their direct shipments from growers with purchases from the wholesalers in Faneuil Hall Market Area and the Produce Terminal. While they may depend as much as possible on agreements with distant producers for the majority of their items, it is obvious that they cannot rely on this completely. Undoubtedly, they rely on the local market more heavily during the New England growing season to stock their shelves with local produce, but it is also impossible to predict exactly either the size and quality of any given year's crop or consumer demand for every item. Also, it may be wiser for the chain stores to purchase specialty items such as parsnips, parsley, kale, watercress, etc., or highly perishable items such as bananas and peaches from the wholesale market than to either bother with direct agreements for a small volume item or to risk spoilage or poor quality of the items received. It is apparently difficult to be sure that fruit and produce in good condition at the shipping point will arrive in good condition.

Another factor that will probably insure the continuance of a traditional market for some time at least, is the scale of operation required to make direct shipments worthwhile. One gets the impression that the direct shipment agreements are mostly between larger growers or cooperatives and large retailers such as the chain stores. As long as there are small growers and small retailers, the market will be needed to serve its traditional function of assembly, sales and

distribution of items from many producers going, directly or indirectly, to many retailers.

It should also be noted that the chain stores have not tended to bypass the meat wholesalers to the degree that they have the produce dealers. This would account for the continued growth of the wholesale meat trade while the produce trade has languished. They evidently do not feel that it would be worthwhile to duplicate the equipment, refrigeration, special construction, etc., needed to handle and break down whole carcasses. This is the one segment of the market where truck freight has not been replacing shipment by rail. By dealing with the local jobber, the chain stores can make almost daily adjustments of supply according to the demand. They would not have this flexibility if they had to make adjustments on the much longer cycle between ordering and delivery of rail shipments.

#### III-A. Summary of Market Components by Commodity

Total receipts of fresh fruit and vegetables at Boston have not varied significantly over the past twelve years. The major change has been the decline of rail receipts and an increase in truck receipts. Roughly, it is estimated that approximately equal volumes of produce are handled at the Produce Terminal, at the Faneuil Hall Market Area, and by the chain stores. A remaining fourth is handled elsewhere. (Half of this last share is accounted for by potatoes and grapes sold directly from cars in the Boston and Maine Railroad Yards in Charlestown.) Local produce is traditionally handled at Faneuil Hall. Although receipts of New England grown

fruit and vegetables have been declining, they accounted for ten per cent of the total Boston receipts in 1957. (See Tables III, IV, V, and VI in Appendix A.)

The wholesale meat trade has grown since 1948. This is indicated by the increased number of dealers and is confirmed by a comparison between the 1954 and 1948 U. S. Census' of Wholesale Trade. Between 1948 and 1954, sales increased 23 per cent (1954 sales adjusted to 1948 base) and the number of establishments increased by eleven per cent. The most significant change in marketing patterns has been the switch of the major meat dealers from the Faneuil Hall Market Area to modern facilities in the New Market Square - Southampton Street area. Most of these dealers were forced out of their downtown locations by the construction of the Central Artery in 1952-53. Prior to construction of the Artery, an estimated 90 per cent of the total meat trade was conducted at the Faneuil Hall Market Area. Now perhaps 80 per cent of the total volume is handled by dealers at New Market Square. Since the overwhelming percentage of the total volume of meat delivered at Boston arrives by rail, dealers without rail access are at a distinct disadvantage with the necessity of trucking meat from the rail yards to their places of business. Even so, there are still a large number of meat dealers operating in the Faneuil Hall Market Area. In general, they are smaller dealers who handle less than car-lot quantities.

Another segment of the Faneuil Hall Market is formed by wholesale fish, poultry and eggs, and dry grocery dealers. The wholesale grocers who have survived have generally done so by handling specialty items or imports. These are assumed to represent a fairly stable

segment of the future market. The remaining wholesalers of shell eggs are expected to be reduced further due to the tendency for distribution channels for shell eggs to bypass the Boston Market.

Appendix A includes a longer discussion of these individual components of the wholesale food market.

#### IV. THE MINIMAL MARKET: CONCLUSIONS AND HYPOTHESES

Segments of the wholesale food market have been splitting off from the whole due to changes in technology and changes in marketing techniques. In technology, with the possible exception of transportation, the most important change has been the introduction of standardization into wholesale food products. First dry groceries, then, through the use of prepackaging, certain vegetables and fruits, and more recently frozen foods and to some extent even meat products, have been brought within the definition of standardized and predictable commodities. The most familiar manifestation of this is the rise of the super-retailer or chain store as the major food distributor. Benefiting both from their scale of operation and from the elimination of many of the traditional steps in the chain of food distribution, they have been able to take over an expanding percentage of the market. Frozen foods also bypass the market. The largest warehouse of the Qunicy Cold Storage and Warehouse Company is now in Watertown where they are engaged in a very large combined receiving and distribution operation.

The meat segment of the food market requires some special qualifications because it is still almost totally dependent on rail shipment and because the chain stores do not generally receive directly or process fresh meats. Nevertheless, the majority of the meat received at Boston is handled by the dealers at Newmarket Square who combine the direct receipt, processing, and delivery steps of the distribution operation.

But after the really significant impact of changing technology and techniques (including scale of operation) has been observed, the continued existence of a reduced and altered, but tenacious, traditional market is also evident.

#### The Specialty Wholesaler

This residual market will be characterized by a high proportion of wholesale dealers handling highly perishable items such as tomatoes, bananas, certain leafy vegetables, and citrous fruits; and also by dealers in specialty items such as imported cheeses, olive oil, dates, figs, nuts, and special meat products or cuts.

#### The Small Jobber or Institutional Supplier

Many of the remaining market operations will be characterized by their scale of operation. The retail grocer, restaurant owner, or small institutional buyer may find that his account receives more attention from the small jobber or institutional supplier than it would receive from a large dealer, say at New Market Square. In turn, the jobber or supplier will be able to assemble a complete range of commodities within the Faneuil Hall Market Area.

#### The Wholesaler-Retailer

At the lowest scale of operations is the wholesaler who supplements his trade with retail sales directly to the consumer. This practice is more common with meat dealers, who sell directly over the counter. The produce dealers dispose of remaining small lots through the push-cart market.

### Local Produce

All locally grown produce has traditionally been handled through the Faneuil Hall Market and will continue to be one of the major distinguishing differences between Faneuil Hall and the Produce Terminal. During the summer and autumn months, most of the activity in produce is composed of locally grown fruits and vegetables. Most of the local produce is handled by commission houses, but there is also a wholesale farmers' market where growers may sell their produce directly to the retailer.

### Hypothesis

One hypothesis which can be derived from the preceding discussion may be stated as follows: "Changes in technology and changes in techniques of merchandizing have been introduced into the food marketing process in such a way that the components of the market most able to incorporate these innovations have tended to split off from the traditional market and to form more direct lines from producer to consumer which bypass the traditional market place." To this statement a corollary statement might be added to the effect that..."While this process has extended until it has affected the major portion of food distributed in the Boston market area, it is nevertheless not a total process and leaves intact a residual market, reduced in size, which is unique with regard to the particular commodities handled, the scale of operation, and the combination of the principal categories of produce in one physical area."

For the purpose of this thesis, it is necessary to carry this one step further in its application to Boston and to conclude that, due to the nature of the consolidation and the marginal character of the trade, it is probable that in Boston, a residual produce market will continue to exist in its present location, the vicinity of Faneuil Hall, for many years.

#### IV-A. Size of the Surviving Market

During the period 1947 - 1957, the volume of fresh fruits and vegetables handled in the Faneuil Hall Market Area is estimated to have declined by at least fifteen per cent. (Compare Tables II and III, Appendix A.) Due to the construction of the Central Artery and the establishment of the New Market Square wholesale markets, the volume of meat handled at Faneuil Hall is estimated to have decreased by 60 - 70 per cent during the same decade. It is assumed that other components of the wholesale food market also declined during this period.

Approximately 460,000 square feet of ground floor area are being utilized by the market at present compared with an estimated 600,000 square feet utilized by the market in 1947. This represents a decline by one fourth since 1947. Despite the construction of the Central Artery, it would appear that the geographical area occupied by the market was not reduced to the same degree as was the volume of food handled in the area. This may be explained by the fact that a shortage of space exists in the Faneuil Market Area so that a decline in the volume of business does not result in an immediate decline in the space required.

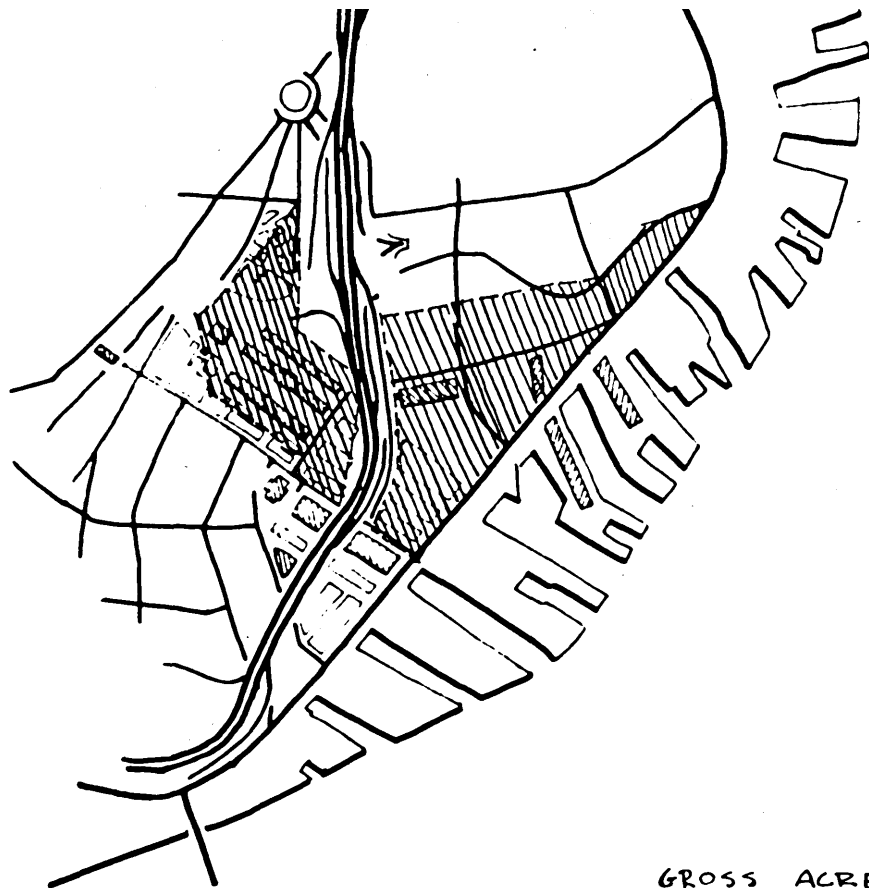


The fresh fruit and vegetable component of the market is the most subject to further shrinkage. For reasons discussed in the text, it is believed that the percentage of the market controlled by chain stores and other direct receivers of produce will level off at some point. Assuming that the wholesale market is consolidating at a declining rate, we might expect the dealers in the Faneuil Hall Market Area to handle fifteen per cent less fresh produce in 1967 than in 1957, and perhaps ten per cent less in 1977 than in 1967.

Despite the tendency of the larger meat dealers to move to New Market Square, the meat markets in Faneuil Hall do not seem to be diminishing. Their problem is not competition from the supermarkets, but competition from the larger wholesalers at New Market Square. The smaller dealers will probably remain but the larger dealers will be tempted to move to the vicinity of New Market Square.

The wholesale grocers who are presently in business in the area have already survived a weeding-out process and can be expected to continue in operation.

If these deductions are correct, the ground floor area utilized by wholesale market uses may be expected to decline to about 350,000 square feet during the next twenty years.



GROSS ACRES - AS SHADED

WEST  $\frac{1}{2}$  SOUTH OF CENTRAL ARTERY - 13 ACRES

EAST  $\frac{1}{2}$  NORTH OF CENTRAL ARTERY - 23 ACRES

GROUND AREA OF MARKET BUILDINGS

BOTH AREAS - 440,000 SQ. FT.

GROUND AREA OF NON MARKET BUILDINGS

BOTH AREAS - 198,000 SQ. FT.

FIGURE 2. FANEUIL HALL MARKET AREA - GROSS AREA AND GROUND COVERAGE

## V. MARINE ASSOCIATED INDUSTRIES AND MARINA DEVELOPMENT

Next to the food markets, the most noticeable group of uses concentrating in this area are those which have in common a linkage or tie to marine activities. The old loft buildings along Atlantic Avenue and the office buildings on lower State, Milk, and Broad Streets, provide space for firms engaging in the sales and servicing of marine engines, marine surveyors, dealers in marine supplies (cordage, sails, canvas) and hardware, ships chandlers, a couple of schools of marine navigation and a few naval architects. There are also a few stores specializing in marine uniforms, a marine laundry, and a towing company in the vicinity. The ships chandlers represent a tie to the markets as well, since they supply food as well as dry goods to the ships still using the Boston Harbor. The major shipyards, and therefore marine repairs, are located in East Boston. There are more firms selling marine engines in Dorchester and Quincy than in Boston Proper. However, the major concentration of ships chandlers and marine supply and hardware outlets is in this area. The professional services, marine surveyors, architects, etc., are very definitely centered here, near to both the waterfront and business district. The steamship companies remaining in Boston seem distributed between locations in the lower State Street area and the Back Bay.

Although this pattern of location was established in the days when the square riggers docked at Atlantic Avenue, these firms still are held by their linkage to the water and to the central office district. The low rent for loft space in this area probably acts as a deterrent

to decentralization.

The key to the future of these activities is intertwined with the fate of the Port of Boston. Should Boston revive as a world port, these businesses would naturally benefit. The decline of the port is partly affected by higher stevedoring costs, lower rates of tonnage discharged per hour in comparison with other ports, and differential rail rates which discriminate against Boston (and New York) in favor of Baltimore and Philadelphia. Oilers and coal ships are increasing their unloads at Boston, but otherwise there is no evidence of a revival.

In the absence of a revival of commercial shipping, these firms will have to rely more on the expansion of pleasure boating in New England for their continued existence. Since natural harbors are plentiful on both the north and south shores, marinas and yacht clubs are spread along both shores. A marina may be associated with a boat yard, but marinas are much more common than boat yards, an estimated 75 of them lying between Cape Ann and the South Shore.

A marina implies the presence of deep water moorings accessible by boardwalks and usually offers supplies, fuel, garbage disposal facilities, ice, and services of that nature. There doesn't appear to be a close relationship between marine supply outlets and marinas since deliveries are made over the road; while this is not necessarily an advantage for the Atlantic Avenue location for marine supply outlets, neither is it a disadvantage. The distribution of boating areas is such that there is no natural alternative for a grouping of these activities, unless they were to distribute in an equally dispersed pattern. A location downtown, near to the professional services and

offices of the business district (and central to a large resident and working population) would seem preferable to dispersion. This does not mean that large warehouses will be associated with these outlets. Supplies or items ordered from these dealers can be shipped directly from factory or regional warehouse to the purchaser. (Merriman Brothers, Inc., for example, manufacturers of yacht fittings and riggings, have their plant in Jamaica Plain but their product is handled by distributors on Atlantic Avenue.)

From time to time there has been speculation on the possibility of developing pleasure boating facilities along the Atlantic Avenue Waterfront. The more fastidious sailors and captains feel that Boston Harbor would be unsuitable because of the dirt, especially in the air<sup>5</sup>, which fouls the decks and rigging. To this point of view, it would be preferable to maintain a boat some distance from Boston where the water and air are cleaner, even though it would entail longer trips to and from by automobile. Another factor weighing against Boston Harbor is the rather long trip out of Boston Harbor. There is no sailing inside of Castle Island. Only larger boats (over twenty feet) with auxiliary engines would use such a facility if it existed. However, on the other side, the demand for such facilities might be great enough to overcome these objections. The recent marina development at Squantum, where the water and air are not clean, has built and rented

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5. The M.I.T. boat house finds that it is less work to physically remove the boats from the water and into the boat house each night than it is to clean the decks in the morning after a night on the Charles.

a couple of hundred slips. On a minor scale, of course, private boats are already kept at moorings along the Atlantic Waterfront, especially between Commercial and T., and between T. and Long Wharves.

Marina development is usually shown on all proposals for waterfront redevelopment, often in connection with luxury apartments. These are regarded, however, as factors which enhance waterfront property rather than as commercial ventures in themselves. This is a valid view and one which conceivably might interest the city in relation to any plans for regeneration of the waterfront <sup>6</sup>.

Such development would have to overcome the ill effects of dirt in air and water, but due to the shortage of good marina facilities in the region, might find a ready demand for space. Marina development would probably make the most sense (in this location) in conjunction with the development of waterfront apartments where the tie of convenience would be very strong.

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6. Marinas are not generally viewed as economic propositions in themselves, but rather are viewed as assets to the community. Even the "Marina Mar" in Fort Lauderdale, probably the most successful marina in the country, had to be taken over by the city from its private developers because of financial difficulties.

TABLE I. LOCATION OF MARINE-ORIENTED INDUSTRIES AND SERVICES - BOSTON 1959 \*

	BOSTON PROPER	E.BOSTON	S.BOSTON	CHARLESTOWN	OTHER-BOST.	OTHER THAN BOSTON	TOTAL
MARINE ENGINES	2	-	2	-	6	12	22
MARINE REPAIRS	3	9	1	-	1	4	18
MARINE EQUIPMENT AND SUPPLIES (INCL. HDWE.)	23 <sup>1</sup>	1	4	-	9	20	57
SHIPS CHANDLERS	11 <sup>1</sup>	1	2	-	-	-	14
MARINE SURVEYORS	7	-	-	-	-	3	10
NAVAL ARCHITECTS	4	-	-	-	-	1	5
SCHOOLS OF NAVIGATION	2	-	-	-	-	-	2
TOTAL	52	11	9	-	16	40	128

1. Four firms are listed under both Marine Supplies and Ships Chandlers

\* Sources - Yellow Pages - Boston, New England Telephone and Telegraph Company

## VI. WATERFRONT APARTMENTS

Lofts on Long Wharf, T-Wharf, and Commercial Wharf have been converted into apartments. The space brings a higher return to the owners when it is in residential use than when it is rented for storage space. However, the first floor space is usually rented to commercial tenants. The demand for these apartments is very strong. Waiting lists are said to number fifty or one hundred persons. Undoubtedly, much of this demand is predicated by the picturesque setting among the old waterfront structures, but the demand may also reflect the convenience of living so close to the center of the city. If so, this demand could be served by new apartments as well.

At the present time there are an estimated 50 or 60 dwelling units on the three wharves mentioned. The owners of Commercial Wharf are presently in the process of converting loft space into apartments and eventually Commercial Wharf will house 72 apartments. After that, the owners plan to convert Lewis Wharf. Due to the absence of safe play space, these apartments will be most suitable for bachelors or couples without children. As mentioned above, there are long waiting lists for the finished apartments and this is without the benefit of publicity.



## VII. REDEVELOPMENT OF THE NORTH END

The area lying between North Street and Atlantic Avenue has been considered in the past (by both the City Planning Board and by planning students) as a logical area in which to begin a piece-by-piece redevelopment of the North End. New housing could be built in this area without displacing any families and would then be available to house the families displaced by further demolition. Desirable though this is from a tactical point of view, the land below North Street does not seem the most suitable for residences, due to the absence of topography and the separation from the waterfront.

North Street has long designated a boundary of the North End and also demarks the original shoreline. This boundary is felt to have both logic and significance and should be retained and clearly expressed in any redevelopment proposals for the North End.

The presence of apartments and a general upgrading of the Atlantic Avenue Waterfront would help to protect that edge of the North End from general deterioration. The low land between North Street and the waterfront can best be used by commercial activity or else kept open to denote a separation between residential land and the waterfront.

## VIII. OTHER USES

### Restaurants and Retail Sales

Two of the more famous of Boston's restaurants, Durgin Park and the Olde Union Oyster House, have capitalized on their history and their relation to the markets. The Blue Ship Tea Room and the Yankee Fisherman draw flavor from a setting among the docks and fish markets. Particularly, the blocks lying between Dock Square, Hanover Street and the Central Artery provide a good setting for restaurants by virtue of their proximity to the business district and proposed Government Center, the presence of wholesale and retail market activity, and the colonial street pattern.

### Potential For Increased Retail Sales in This District May Stem From Several Sources

1. The retail side of the produce market. Consumer buying in the vicinity of the wholesale market may have greater appeal in the future, due to more people in the region and a decline or absence of the small retailer in outlying areas. The spread of affluent attitudes towards the purchase and consumption of food may popularize more sophisticated shopping habits. The market may benefit from a reaction to the increasing depersonalization in the distribution of foodstuffs.
2. The existing retail outlets for produce could be supplemented by a retail farmers market. While this would compete with the push-cart market, it would allow the consumer to purchase first-rate

garden produce instead of the second-rate produce passed on to the push-cart operators by the wholesale dealers. It would provide an opportunity for other farm products, especially butter, eggs, and cheese, to be sold directly to the consumer by the farmer.

3. Other retail food outlets not now associated with the wholesale market might find such an association to be profitable. Pastry shops, imported foods and spices, specialty grocers, and candy stores would add to an interesting retail market "mix" <sup>7</sup>.
4. Should the retail markets attract sufficient consumer purchasing power, then retail outlets for other items, such as clothing and home appliances, might also be supported. Residential or marina development along the waterfront, or the exploitation of historical character in the area would also add to the consumer market.

Bars and lunch rooms serving the workmen in the market and on the waterfront as well as the nearby office employees are already spread through this area.

#### Offices

There is no evidence of a demand for new office space on the lower State Street - Atlantic Avenue edge of the central office district.

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7. Such a mixture of retail markets, including meat and poultry markets, already exists on Hanover and Salem Streets in the North End. The suggestion made here, therefore, is not entirely novel, but does view the potential as of regional, rather than city or neighborhood significance.

The expectations of the construction of both the Prudential Center and the Government Center in the near future make major office building construction on lower State Street even less probable. However, a few choice sites do exist in this area (on lower State Street and Broad Street) which, due to their relation to the Central Artery and the waterfront, would afford the most dramatic settings in the city, comparable to lower Manhattan.

#### History, Recreation, and the Commercial Waterfront

Faneuil Hall Market, lower State Street, and the Atlantic Avenue wharves, especially Long Wharf, are all rich with historical connotations. Arguments are commonly waged over how this heritage can best be preserved. One point of view laments that Boston's historical buildings either lie in disuse or are ill used. The other point of view dreads that Dock Square and the waterfront should become a miniature Williamsburg. Is it not pertinent here to suggest that activities also convey historical connotations and that buildings or forms stripped of the functions for which they were constructed may have an air of mortality about them? The principle should be that buildings should not be restored at the sacrifice of their functional utility and that, when the original activities have atrophied but the buildings still have architectural or historical merit, new activities should be sought as replacements. In the case of the Atlantic Avenue Waterfront, the development of public recreational space and walks, in conjunction with the granite warehouses and perhaps the U.S.S. Constitution, would serve to expose both Bostonians and visitors not only to a gracious past, but also to sun and salt air.

The extent to which port and harbor activities have declined along the waterfront make it desirable to introduce new commercial activities in order to revitalize the waterfront. Some feasible uses for this area have already been mentioned, i.e., apartments, marinas, and restaurants. In addition, sightseeing cruises, deep sea fishing, and excursion boating are activities which are likely to become more popular in the future. Motels or even a hotel or theatre could be included in the development of commercial recreation facilities. A combination of such uses would begin to recreate a lively character on the waterfront.

Such a process of revitalization should not be carried to the point where it excludes or forces the remaining activities traditionally associated with a seaport from the area. Otherwise, the waterfront, deprived of all commercial traffic with the sea, might take on too frivolous an aspect.

#### Parking

Large areas of both India and Central Wharves are now being used as parking lots. Parking space beneath the Central Artery is also being utilized to capacity. There is little doubt about the existence of demand for downtown parking space, but in the case of Central and India Wharves, it is not a use which enhances the appearance of the waterfront or takes advantage of the visual setting. It is viewed as an interim use of these locations. As such, it should not be entirely discounted.

The demand for parking space provides an economic return on land which can serve to keep it productive while awaiting more intensive development. In this way, as an interim use, it aids in a gradual process of redevelopment.

It is recognized that more permanent parking space would have to be provided in conjunction with new residential or recreational uses.

One possible way of doing this would be to provide separate surfaces for automobiles and for pedestrians.

## IX. SUMMARY

The wholesale food market is expected to continue to be the principal activity in this area although it is likely to decline over time.

The larger and more standardized wholesale food operations will tend to be located in outlying market areas, leaving behind a residual market which is characterized by the scale of operations, including auxiliary retail sales, and by the handling of local produce, highly perishable items, and specialized items or imported foods.

Marine surveyors, schools of marine navigation, dealers in cordage, sails, canvas supplies, and marine hardware, marine repairs and services, and ships provisioners make up a residual group of activities which were originally linked to the Port of Boston. Although their linkage to the water may be weaker now (i.e., deliveries are made directly to the buyer from regional warehouses by truck), the waterfront still provides a traditional and logical locus for these activities. Some steamship lines and import-export firms also have offices on lower State Street. Enterprises such as wholesale fish markets, ships provisioners, and importers of foodstuffs have ties to both the market area and the water, which makes this particular location a suitable one for them. While these activities, on the whole, are not likely to become more numerous, they nevertheless constitute one of the more important existing groups of uses and are essential to the commercial character of a world port.

Potential for revitalizing the waterfront lies in three categories: one, the waterfront offers good sites for residential apartments, due to its proximity to downtown and pleasant setting; two, for much

the same reason, this location would provide suitable sites for hotel or motel developments; and, three, the openness and flavor of the waterfront provide the potential for greater recreational use. Recreational uses would include pleasure boating, sightseeing cruises, excursion boating, public walks and historical items such as the U.S.S. Constitution. The historic significance of Long Wharf might be exploited by the development of some kind of public entertainment facility there. A combination of such new and old uses would help to make the waterfront of the city again a scene of vitality and interest.

The construction of the Government Center above Dock Square should lead to a greater number of restaurants and consumer services in the area between Dock Square and Haymarket Square. Little demand for new offices is expected, although some very good sites exist in this area.

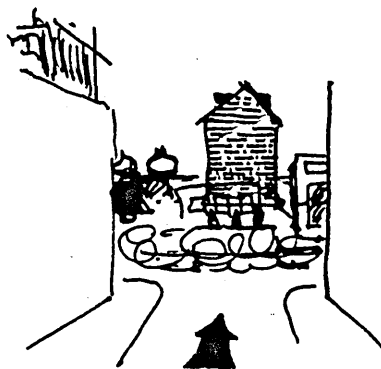


# X. BOUNDARY CONDITIONS AND VISUAL ANALYSIS (see Figures 6 and 7)

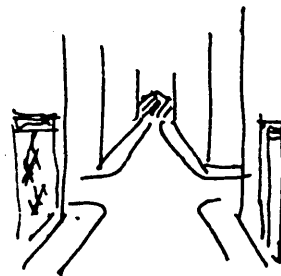
## North Street Edge

Paralleling North Street there is a transitional area which lies between the wholesale and storage uses along Commercial Street and the residential area of the North End. This transitional area is characterized by dwelling units over and beside wholesale, storage and retail units. Perhaps the greatest disadvantage of this arrangement is the competition which results for the use of the streets among commercial vehicles, playing children, and pedestrians. The physical or architectural edge along North Street and

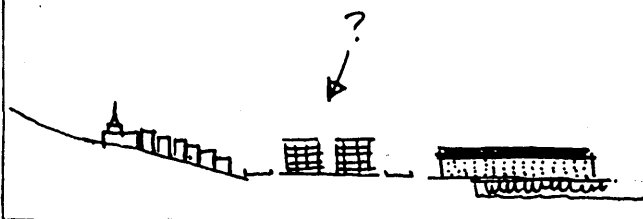
sometimes extending to Commercial Street is sharper than is the transition between uses. Narrow cross streets perpendicular to North Street and solidly built-up blocks create the effect of a continuous edge. These cross streets slope gradually though unmistakably downward to the old waterfront which originally lay just below North Street. In the reverse direction, the uphill slope and narrow streets cause a rapidly closing perspective view. The relationship between the boundary of the North End



NARROW STREETS  
CLOSING PERSPECTIVE



FOOT OF SLOPE

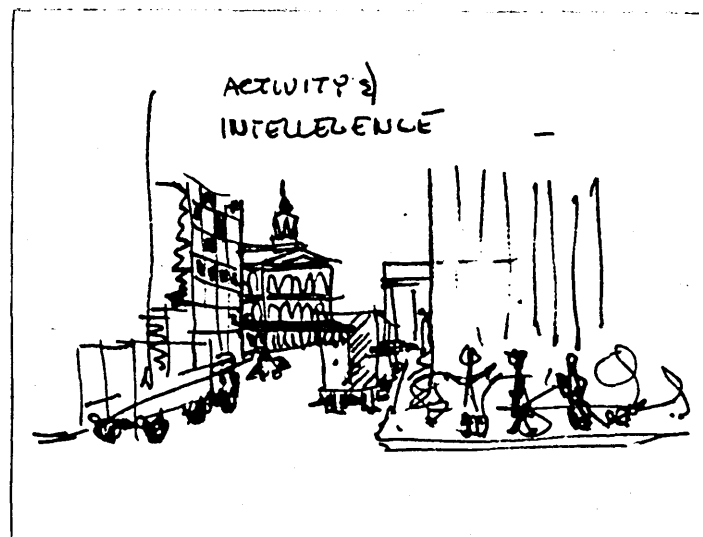


and the waterfront is obscured by the strip of buildings lying on the filled-in land between the old and new shorelines. For example, Lewis Street originally led down to the waterfront but is now blocked directly by a large warehouse.

The general problem is: how can the physical relationship between the North End and the waterfront be re-established while maintaining the well-defined boundaries of the North End and without allowing an unwanted combination of commercial activities and residential uses?

#### State Street Axis

A fairly sudden transition occurs behind the northern side of State Street between the Faneuil Hall Market Area and the financial district. This transition is not as sharp below the Custom House where the demand for office space has declined and some marketing and wholesale uses are found on both sides of State Street. State Street is important in its own right as the main street between the old State House and Long Wharf and the sea. This connecting axis quality is well expressed between the Old State House and the Custom House because of the narrowness of the street, the downward slope and the moderately tall buildings on either side. Beginning at the Custom House, this axial character is greatly weakened by the broad open space at the base of the Custom House, by the increased width and levelness of State



Street below the Custom House, and, finally, by the visual obstruction of the Central Artery. Below the Custom House and below the Artery, the occurrence of marine-oriented activities and the architectural style of the old commercial buildings do more to convey the sense of approaching the water than does any visual tie to the waterfront itself. In fact, State Street provides instructive glimpses of activity along its entire length. On the northern side of State Street, the traveler can view market buildings and market activity at Merchants Row and at Commercial Street. On the southern side, Congress, Kilby, and Broad Streets give views of the financial district and related activity.

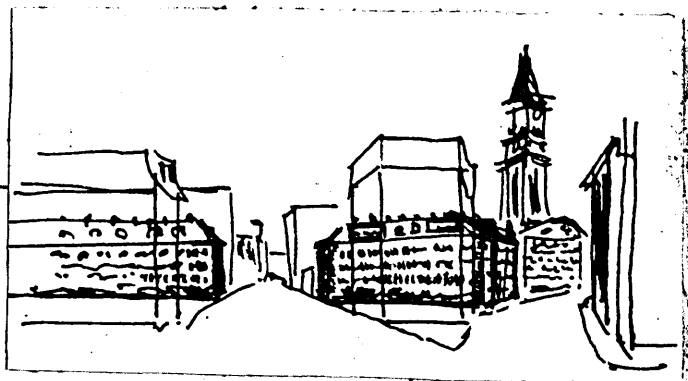
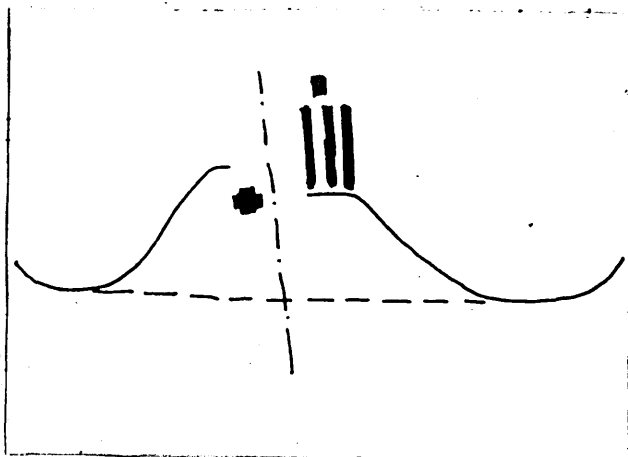
A clearer example of the axis of State Street, extending onto Long Wharf, would help the observer to relate the waterfront to the financial district and Government Center.

#### Atlantic Avenue and the Waterfront

The intersections of Broad Street with Atlantic Avenue and Commercial Street with Atlantic Avenue make two corners of the early nineteenth century harbor which was later cut across by the construction of Atlantic Avenue as a causeway. Both of these points now offer the choice of either continuing along the waterfront to enter the market district or the lower end of the financial district. They are also the points on Atlantic Avenue from which it is most possible to comprehend, geographically at least, the wedge of filled-in harbor which lies between Atlantic Avenue and the Custom House and Quincy Market.

Looking south on Commercial Street at Atlantic Avenue, the Custom House tower is visible and serves to orient the traveler. The Commercial Wharf building was cut in two parts by the construction of Atlantic Avenue and the architectural continuity that exists between the two portions of the building makes it evident that the shoreline once curved inward at that point.

Broad Street and India Street also strongly express the lines of the old harbor. However, this is obscured at their intersection with Atlantic Avenue by the presence of the Central Artery which visually blocks Atlantic Avenue from the lower portion of the financial district across the Artery. The intersection of State Street with Atlantic Avenue is marked by two prominent though inelegant buildings - the Telephone Office Building and a Quincy Cold Storage Warehouse. There is no adequate visual extension of State Street across Atlantic Avenue onto Long Wharf. Even though water may reach to the edge of Atlantic Avenue it is not evident because the view from Atlantic Avenue is blocked by wharf buildings or by small buildings along Atlantic Avenue itself.



COMMERCIAL STREET AT  
ATLANTIC AVENUE

In other cases, the interpenetration of land and water, man and the sea, is more clearly expressed. The decline of activities associated with the waterfront account in part for the fact that the water is not as noticeable as it might be. There is a lot of activity along Atlantic Avenue, but it is mostly trucking associated with marketing and wholesale and storage uses.

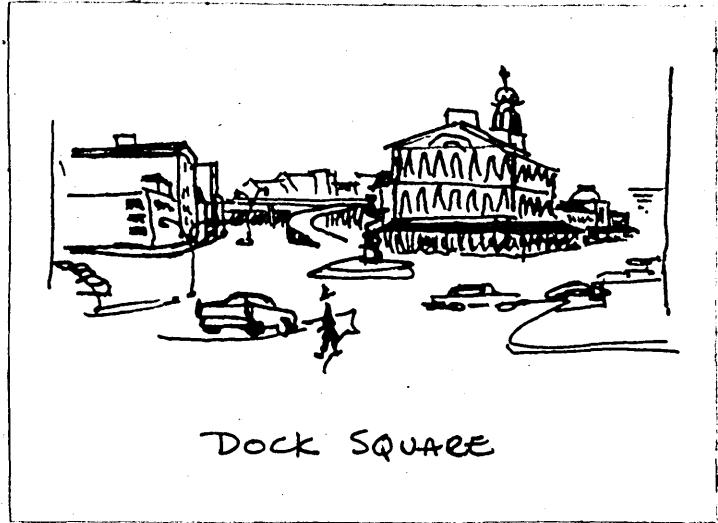
#### Dock Square - Union Street

The block, or blocks, bounded by Hanover, Union, North, and Blackstone Streets is of architectural and historical interest because it contains the remainder of an eighteenth century street pattern and a few houses from the same period. Functionally, it contains wholesale meat markets along North Street, wholesale and retail meat markets along Blackstone Street and restaurants and retail sales along Union Street. Blackstone Street is also used for the weekend push-cart market which merchandises fresh fruit and vegetables directly to the consumer. Conceptually, this block is more or less left floating between the Central Artery and Washington Street. This will be more true when the Government Center is constructed immediately above it.

Before the construction of the Central Artery, Faneuil Hall, located in Dock Square at what was once the head of the original Town Dock, served as the keystone to the wedge of market uses lying between Dock Square and the waterfront. Faneuil hall is supported in its keystone role by the three fine market buildings sited just below it. These four buildings, taken together, have enough planned order to survive as a unit despite the separation from the rest of the market

area. The downward slope from Adams Square to Dock Square is probably the strongest organizational element relating Dock Square to the area above it.

#### Architectural Character



Many fine granite warehouses still exist in the market and waterfront districts. These buildings are very handsome examples of the commercial architecture of the first half of the nineteenth century. They include Commercial, Lewis, and Union Wharves, the warehouse on Commercial Street, Quincy Market and its two flanking buildings, the State Street Block and the Grain and Flour Exchange. These granite buildings, excellent in themselves, together provide a harmonious architectural theme which pervades and characterizes this area.

## XI. THE PROPOSED PLAN

### Objectives

1. To allow and encourage the continued existence of the traditional produce market and marine-oriented activities in this area with a minimum of disruption and inefficiency.
2. To begin a process of economic revitalization, to bring uses of higher economic value and of greater physical intensity into this area.
3. To protect adjacent areas of integrity, for example, the North End.
4. To conserve the best examples of architecture, especially the granite commercial buildings of the early nineteenth century.
5. To clarify the relationship of this area to the city.
6. To express the interpenetration of sea and land (topography).
7. To express the interpenetration of sea and man (his activities).
  - a. Amusement
  - b. Travel
  - c. Breadwinning
8. To provide adequate facilities for the circulation of people and goods.
9. To increase the potential for delight and recreation.

### Major Concepts and Proposed Uses

Figure 8 represents the major design concepts of the proposed plan.

They are as follows:

The band created by India and Broad Streets would be extended across the Central Artery and Atlantic Avenue. A continuity of this band would serve to overcome the division created by the Central Artery and form a simple relation between the waterfront at this point and State Street at the base of the Custom House.

Redevelopment of the waterfront would begin at this end of the waterfront (Rowes Wharf - India Wharf), where especially India Wharf and Central Wharf have fallen into disuse, and would extend northward. Re-uses in this southern portion of the waterfront would include a hotel, the Wilson Line, apartments, facilities for harbor cruises and deep-sea fishing, and restaurants or concessions. This area could be given a consciously glamorous treatment, emphasizing the view of the harbor, expensive boats, and ostentatious architecture.

Long Wharf receives special attention in this plan because of its strategic position and historical importance. Recommended uses include a motel, restaurant, and social pavilion with space for dancing, jazz band concerts, and public gatherings. A small tower could also be included with an observation deck and perhaps some specialized office space (Port Authority, Longshoreman's Union, Historical Society) or rental space for luncheons, lectures and meetings. The combined effect should be one which provides interest for the sightseer during the day and entertainment for the public during the evening (music, food and drink, lights on the water, etc.). The architecture should provide a suitable terminus to the axis of State Street.

The negative counterpart of Long Wharf and the most important spatial element in the plan, the harbor lying between Commercial Wharf and



T-Wharf is brought inland to form a basin on both sides of Atlantic Avenue. This becomes an important unifying element in the area east of the Central Artery. It also clarifies the causeway nature of Atlantic Avenue and provides at least an image of the original harbor cove. Tidal fluctuations in the inside basin could be controlled by a weir beneath Atlantic Avenue. Opposing sluice gates, one above the other, would cause a flushing action to result from the tidal cycle. While no specific proposal for the use of this basin is made other than the general designation of public recreation, some sculptural elements would be needed to give focus to the space. The development of such elements could be in connection with some function that would provide public entertainment, for example, an aquarium or amphitheatre, or it could be limited to the provision of walks, fountains and sculpture in the setting of a marine park. In either case, such development should not be so extensive that it would deaden the space created by the basin.

The waterfront area from Commercial Wharf to Union Wharf becomes the locus of surviving traditional uses. Industrial services and wholesale activities displaced by the redevelopment of other wharves could relocate in this area. For example, the existing wharves house a considerable number of wholesale shellfish establishments. These could be concentrated in this area as they were displaced by redevelopment. Ships chandlers and some marine supply dealers would also operate here. In short, this area would retain whatever is left of the romance of man's commerce with the sea. Here also would be restaurants and even retail seafood markets. The upper stories of the granite wharf buildings would be used for residences and new

buildings might be provided with residences over commercial uses. Mooring space would be provided for privately-owned fishing vessels and other small craft. The Quincy Cold Storage Warehouse on Eastern Avenue and the steam plant on Lincoln Wharf are expected to continue their operations indefinitely at these locations.

The locus of commercial activities extends from the waterfront to the three long markets below Faneuil Hall. Wholesale food markets, including some new buildings, would be sited between the newly formed basin on one side and the redeveloped residential edge and new tunnel on the other side. Attention should be given to providing a strong connection between the market areas on either side of the Central Artery so that good communications are maintained throughout the market.

The proposed redevelopment of the edge of the North End takes advantage of the change in elevation between the fifteen and twenty-foot contours by the construction of a terrace behind the row of residential units which overlooks the market area. The residential edge will serve to enclose North Street and maintain the close quality of North End streets.

The well-organized group of buildings composed by Quincy Market, the buildings facing Quincy Market across North and South Market Streets, and Faneuil Hall has already been described as the keystone of this study area. In conjunction with Dock Square, they form an important joint where major differences in orientation of streets and buildings are resolved. It will also mark the juncture of the market area, the

financial district and the Government Center. These buildings will be conserved and some of the space in Dock Square now used for circulation will be used for additional retail markets, including stalls for a farmers' retail market.

Figure 9 shows the general allocation of land and water uses.

### Circulation

The plan places greater emphasis on the roadway beneath the elevated expressway as a major service road through the area. The removal of three ramps from the Central Artery discourages its use as a local service road and eliminates some of the excessive weaving movements that now hinder traffic flow on the Artery. Another ramp, the north-bound on-ramp at Northern Avenue, is considerably altered to provide an accessible exit via Broad Street from the lower financial district. The roadway beneath the Artery is extended from North Street to Causeway Street by depressing it below the surface level opposite what is now Haymarket Square.

The handling of access between the Government Center and the two tunnels is shown schematically in Figure 10. This particular solution has the advantage of also allowing a direct connection between the Government Center and Washington Street North.

Atlantic Avenue and Commercial Street would remain important service streets.

### Staging and Implementation

Implementation of this plan would require between thirty and forty years. It would require both public and private initiative.

The rate of consolidation of the Produce Market is the most important variable in the timing of the plan. The ground coverage of market buildings as shown on the plan represents a decline of thirty-five per cent from the present coverage and corresponds to the expected needs for space three or four decades from now.

Three new wholesale market buildings are proposed. Their construction should be staggered so that the surviving firms may relocate with a minimum of difficulty.

Redevelopment should begin with the three blocks bounded by Commercial, Richmond, North and Fleet Streets. The largest of these blocks has already been partially demolished by the new tunnel construction. Since there are few markets in this area, the new market building could be used to relocate the firms which would be displaced by the next clearance, which would be of the blocks bounded by Richmond, Commercial and Cross Streets and the new tunnel. Firms could be moved into the new building on this site from the buildings which occupy the site of the eventual basin. Those buildings could then be razed. The construction of the third new market building would correspond with the razing of the remaining one and two-floor buildings in the basin site and the removal of the railroad yard. Dredging of the basin could then begin.

Redevelopment of the markets could be carried out by a revived Massachusetts Market Authority and operation of the new buildings could be handed over to the Boston Market Department or to a market cooperative formed by the tradesmen themselves.

It is assumed that private developers could be found for the wharves south of Long Wharf, since income producing re-uses are proposed for them. The city or state might have to develop Long Wharf because of the greater proportion of public uses.

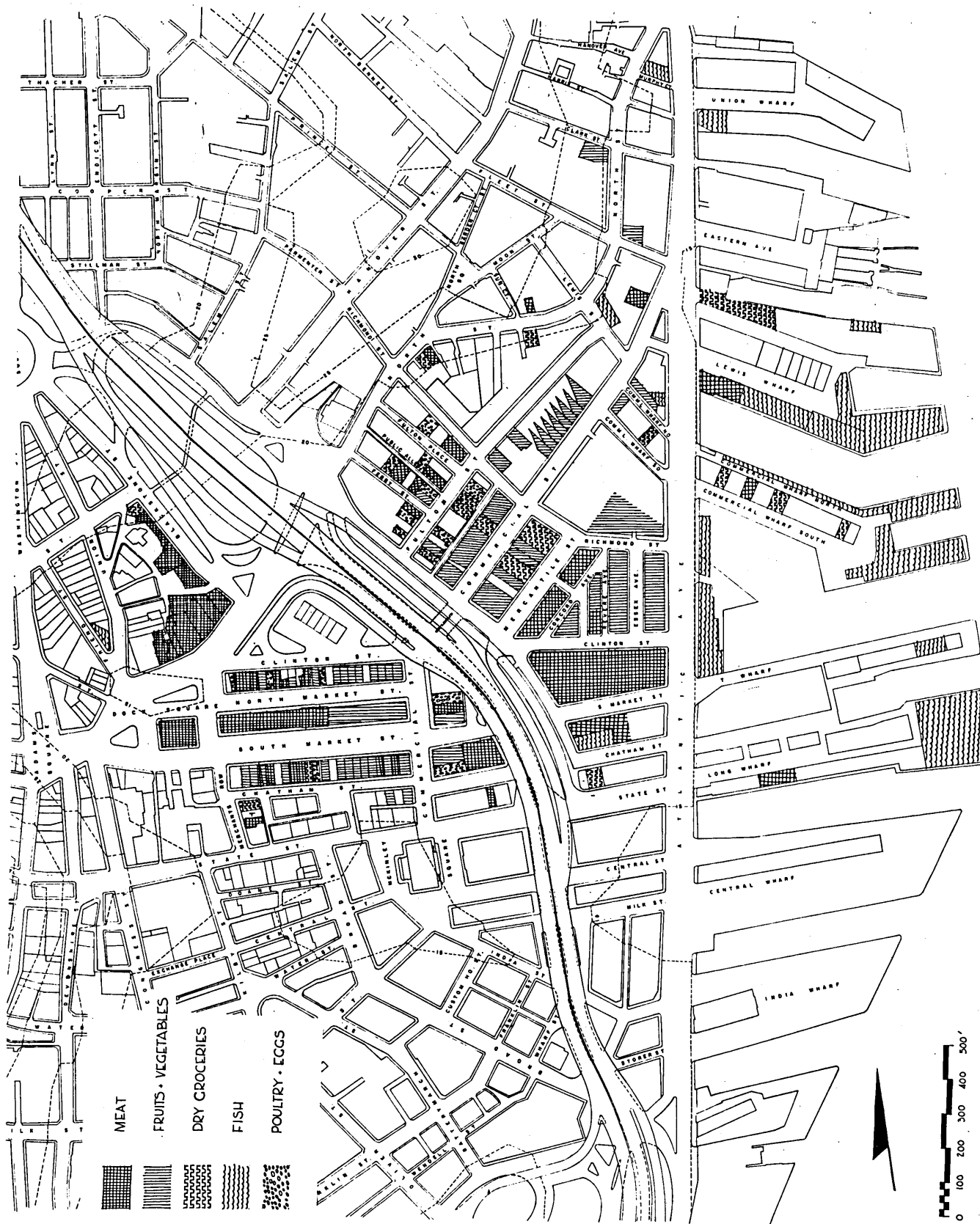


FIGURE 3. WHOLESALE FOOD MARKETS - BY COMMODITY

FIGURE 4. LAND USE

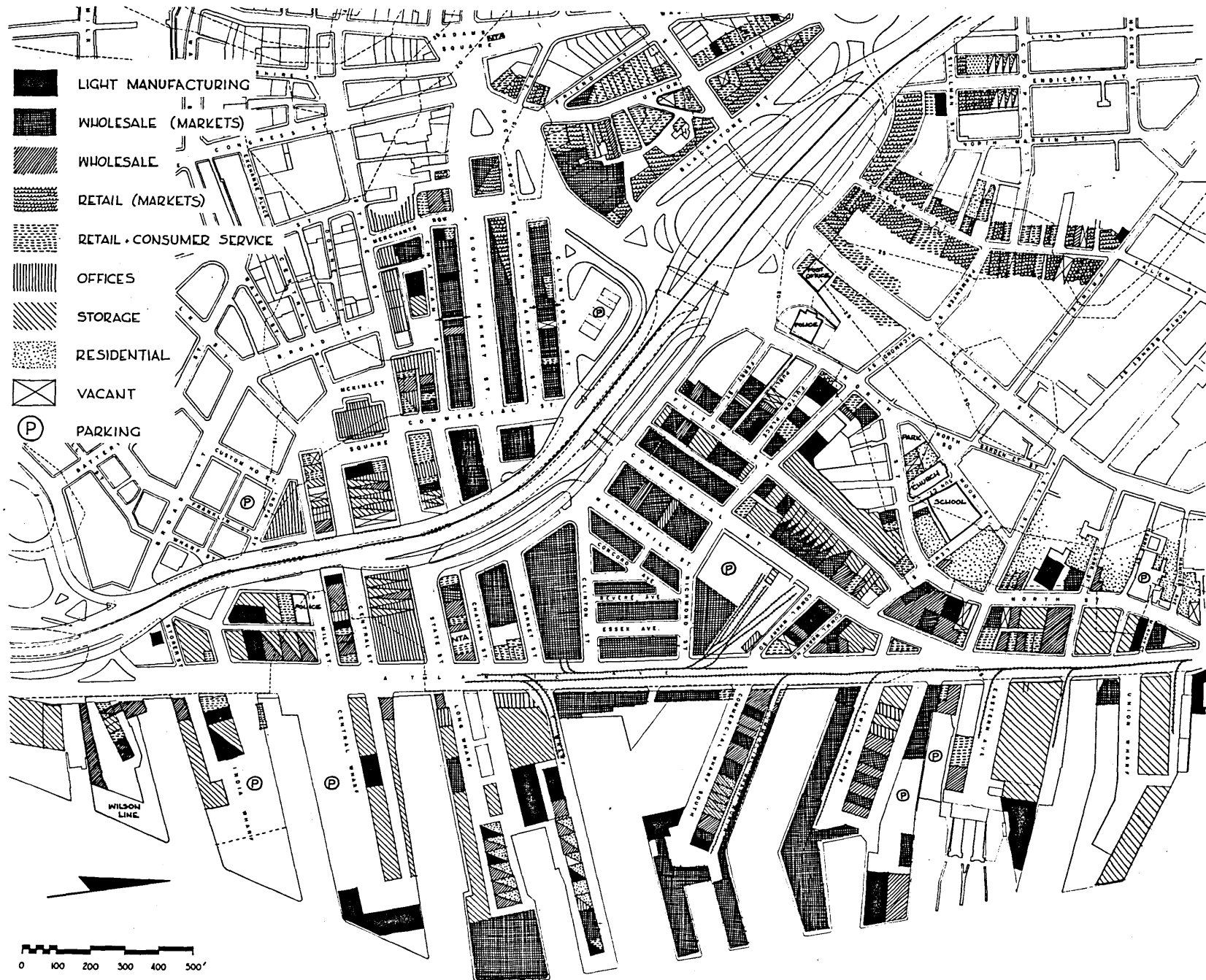


FIGURE 5. BUILDING HEIGHTS

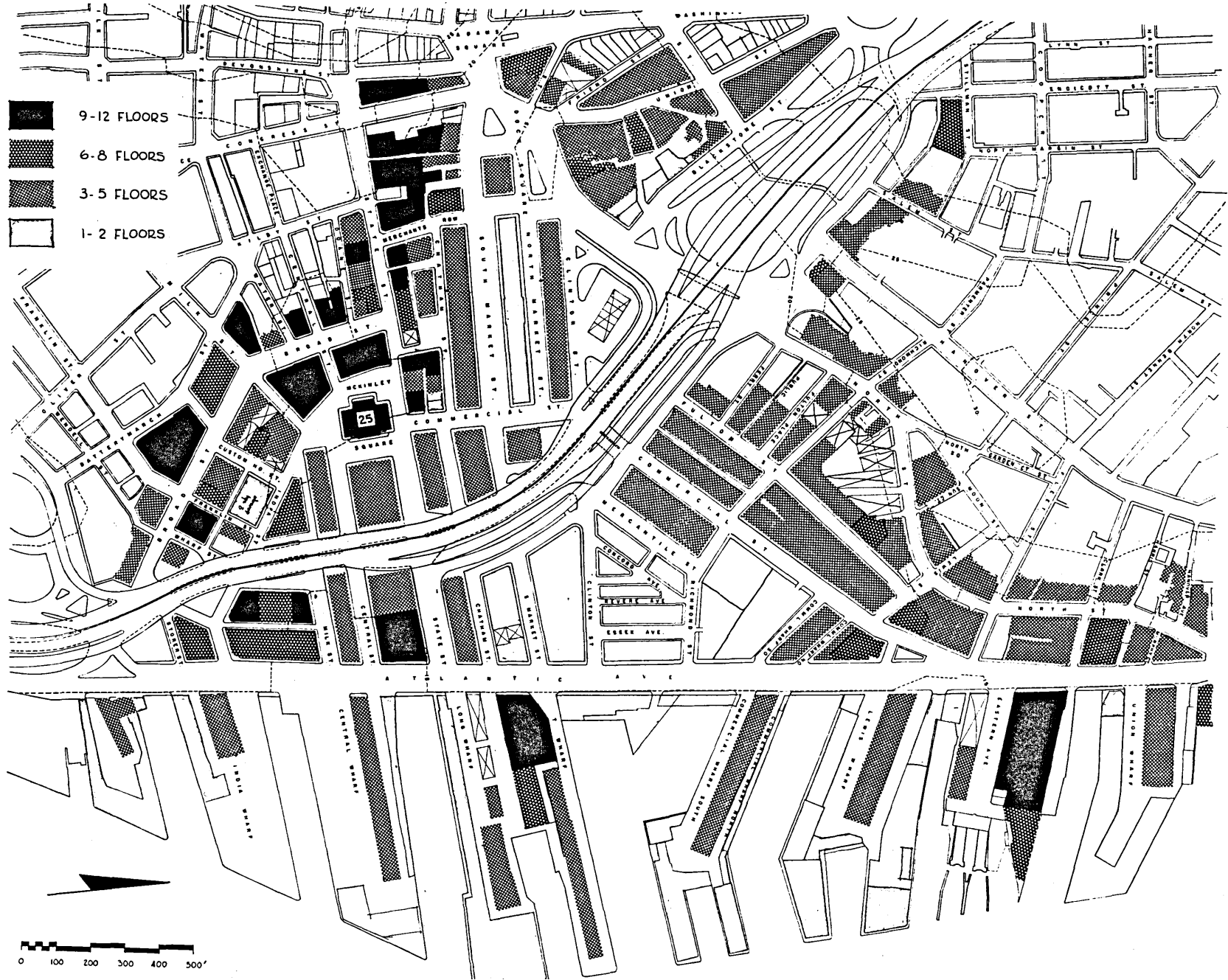




FIGURE 6. BOUNDARY CONDITIONS

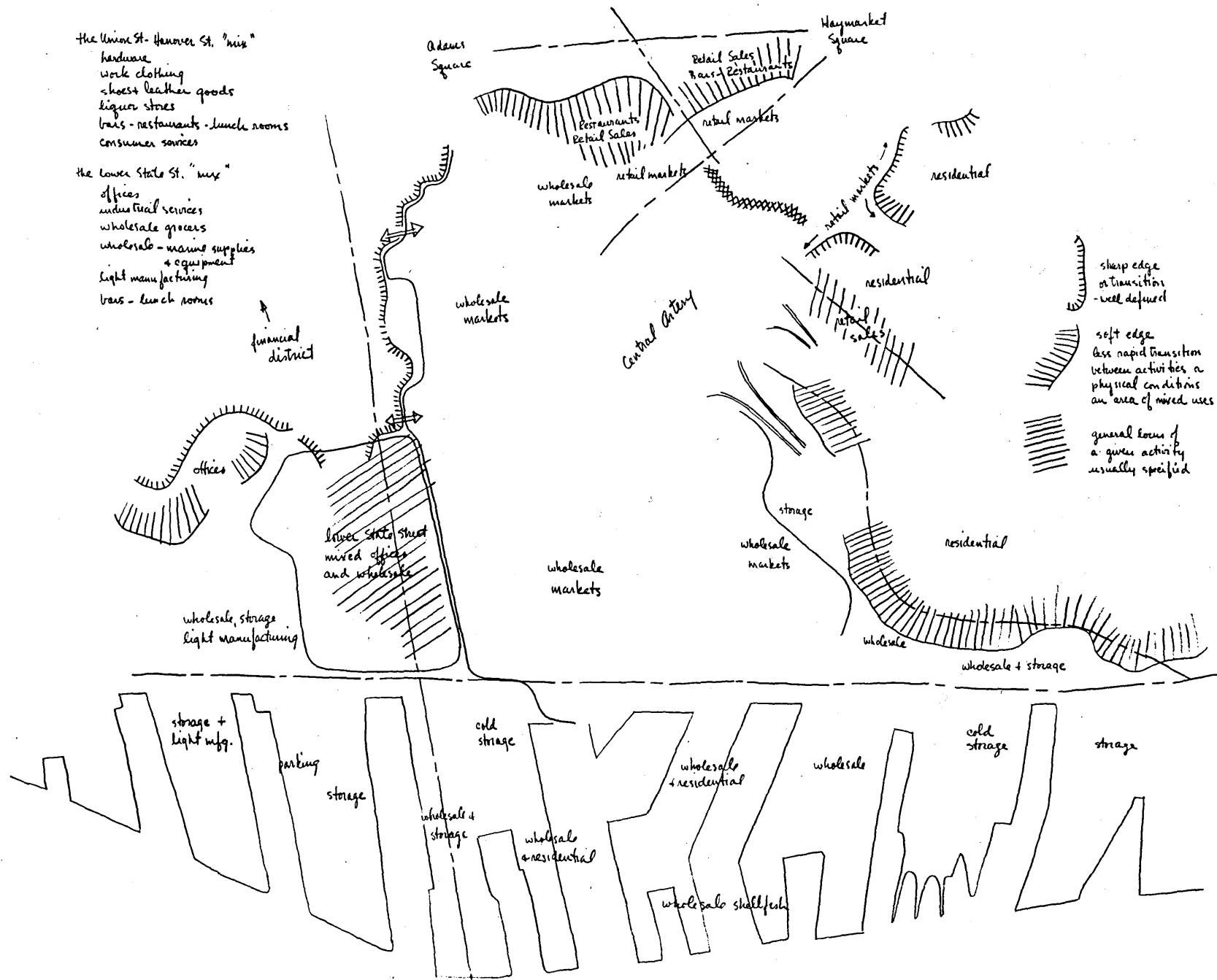


FIGURE 7. VISUAL ANALYSIS

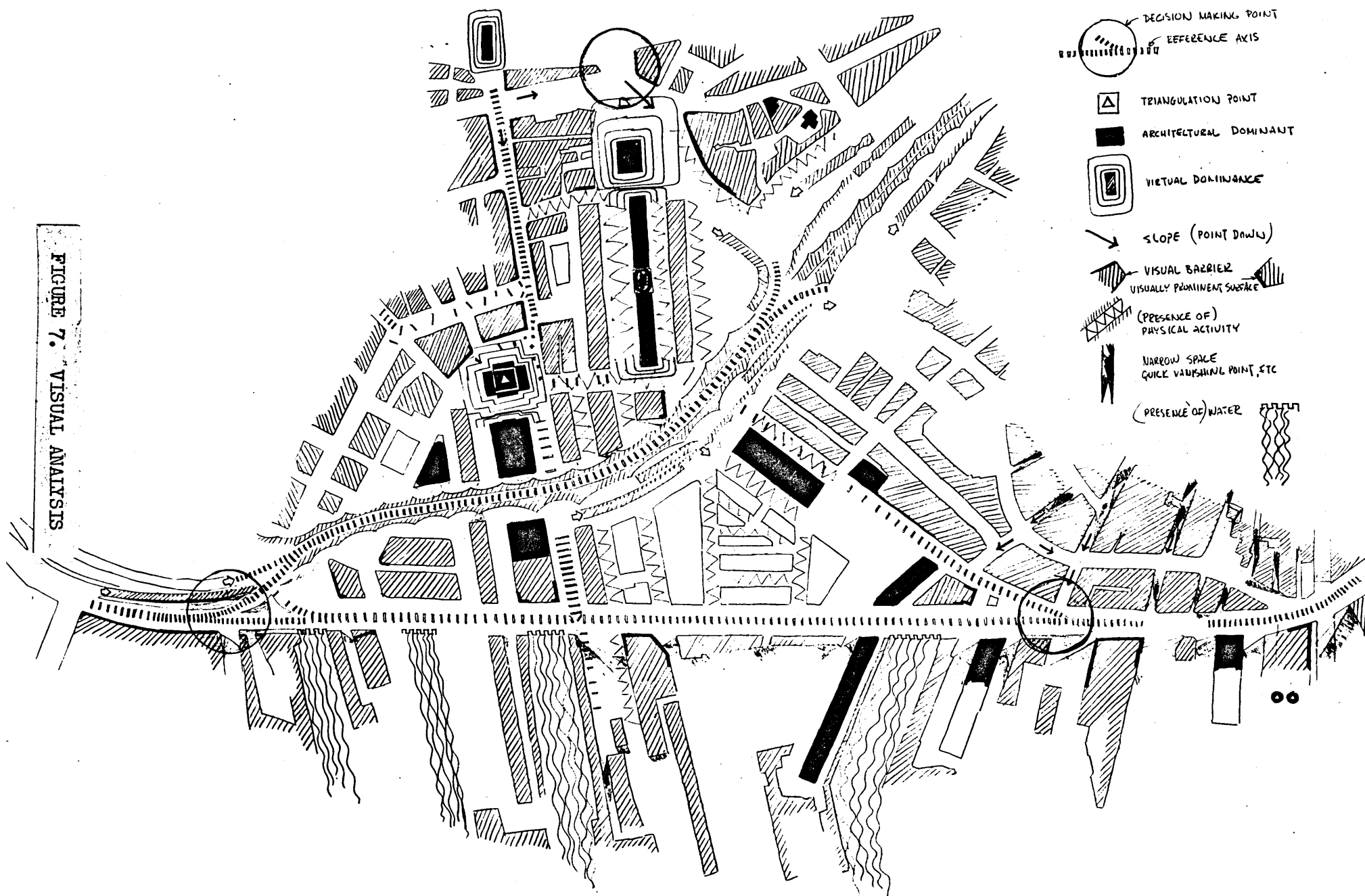


FIGURE 8. DESIGN CONCEPTS

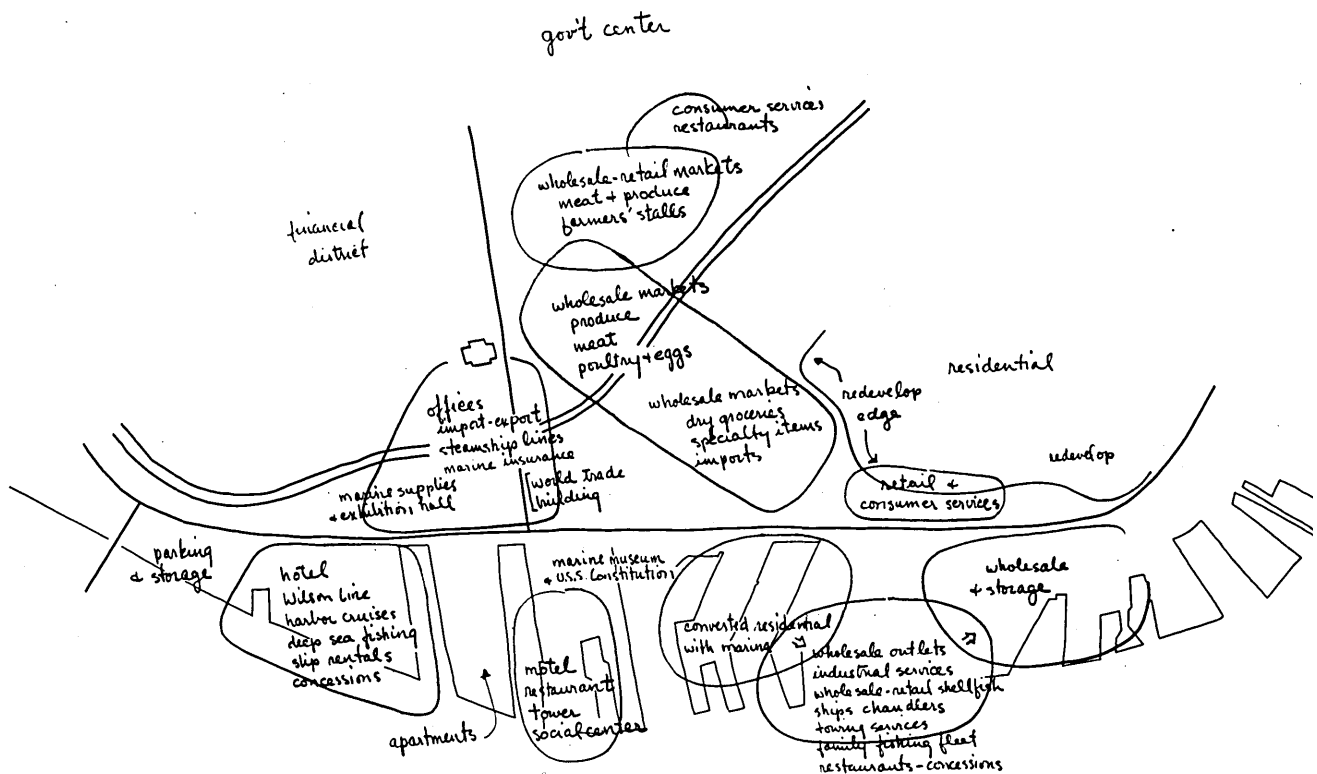
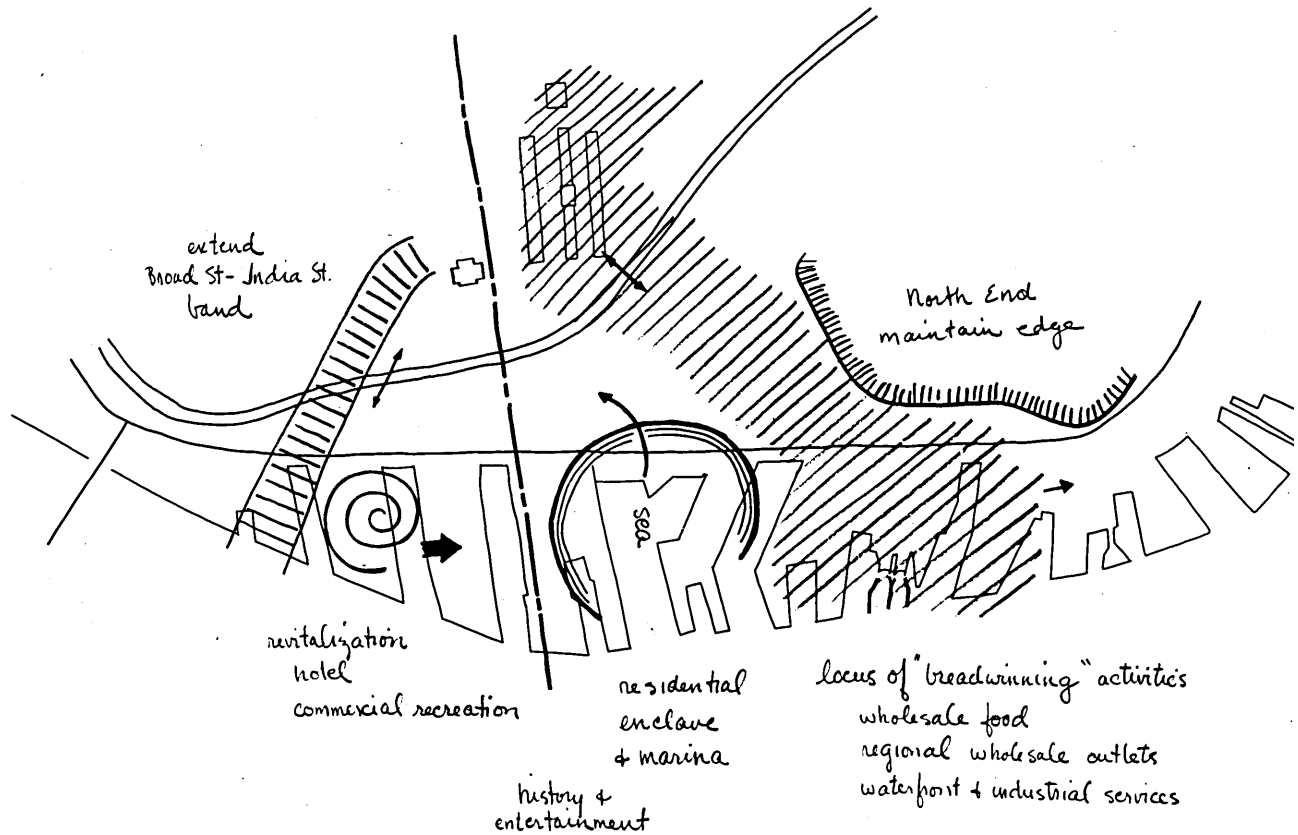


FIGURE 9. GENERAL ALLOCATION OF LAND USES

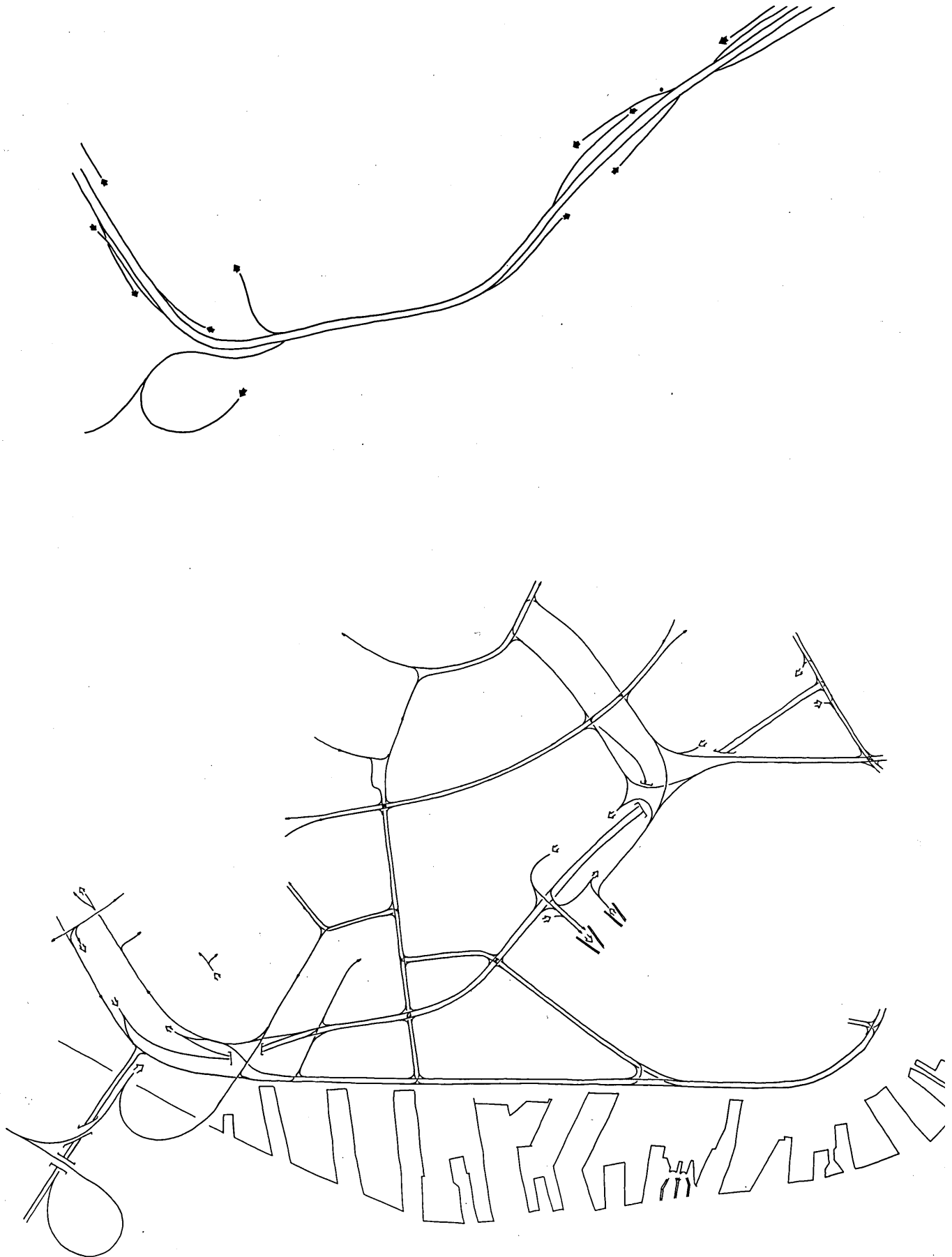
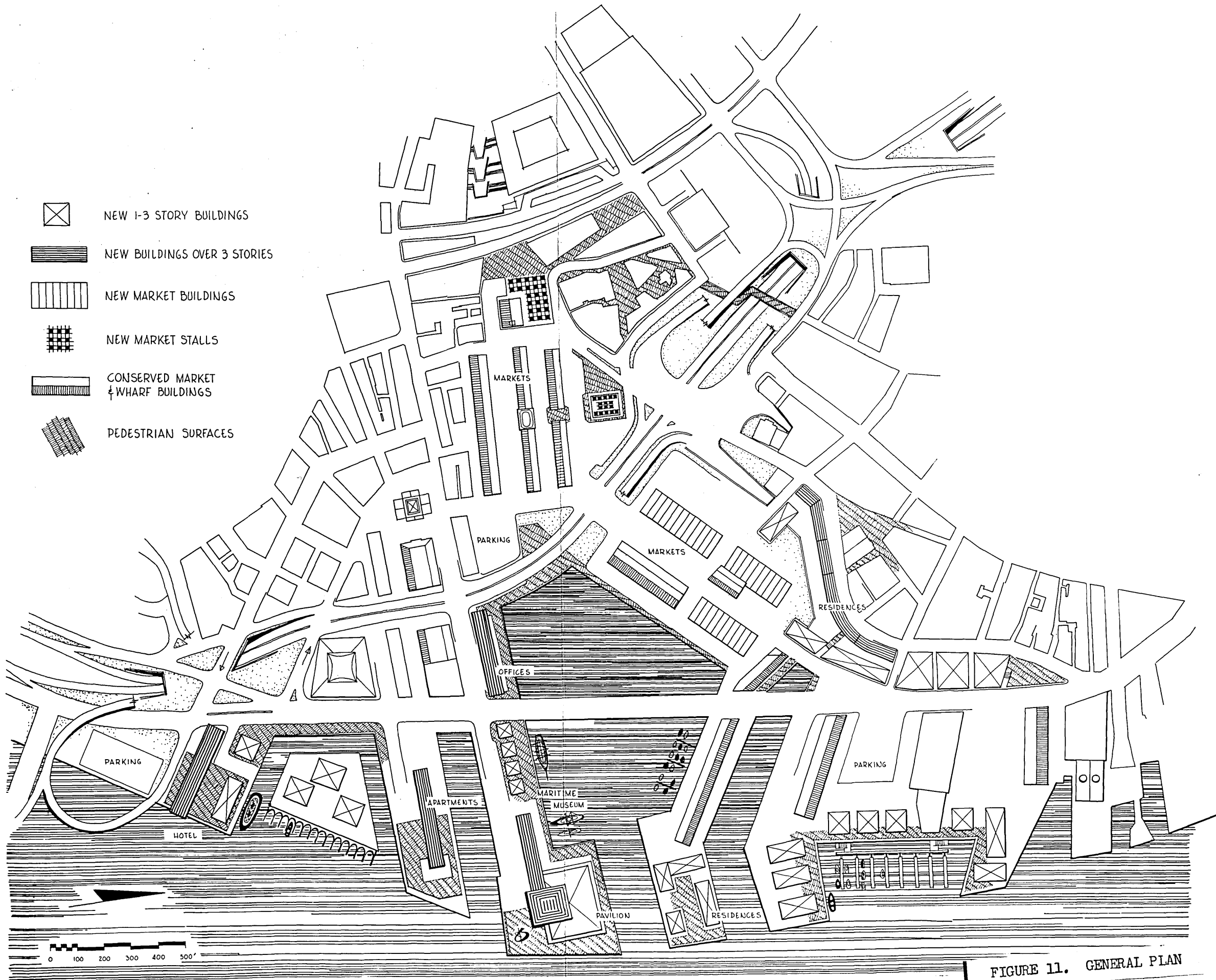


FIGURE 10. VEHICULAR CIRCULATION - SCHEMATIC PLAN



APPENDIX ARELATIVE IMPORTANCE OF THE VARIOUS MARKET AREAS, THE VOLUMES OF FOOD  
HANDLED AND THE NUMBER OF OPERATORS

The more complete data are available on unloads of fruits and vegetables than on the other commodities. (See Table II.) Although some of the estimates are very rough and subject to serious qualifications (see notes at bottom of Table III), it appears that the chain stores and the Produce Terminal handle about the same volume of produce while Faneuil Hall Market Area handles slightly less. Rail receipts of watermelons, potatoes, and grapes were separated because these items are sold from rail cars in the freight yards - grapes and potatoes in the Boston and Maine yards in Charlestown, and watermelons in the New York, New Haven and Hartford yards in South Boston. By juggling the assumptions on the handling of potatoes, the estimates could be changed considerably, since potatoes accounted for over one quarter of the 1957 receipts by volume.

Double bookkeeping is inherent in the breakdown of receipts of fruits and vegetables because the principal buyers at the Fruit Auction are wholesalers who deal in smaller than carlot batches, the chain stores supplement their direct receipts by purchases in the markets, and the dealers purchase from each other even within the same market. The 1950 report on the Boston Market by the U. S. Department of Agriculture broke down total (1947) sales volumes into direct receipts and purchases from other dealers. This was based on extensive surveys of the individual firms. (See Table II.)

However, where estimates have been made, they are based on the opinion of the men who are most closely involved with the market. In the case of Faneuil Hall Market Area itself, fairly accurate information is available on the receipts of native New England produce (see Table IV), but no information at all is available on total receipts or sales. Estimates by market operators of the percent of the total volume comprised by local produce varied according to the particular nature of the business. Firms dealing primarily in local produce (apples, mushrooms, parsnips, cabbage, squash, carrots, etc.) gave high estimates, while firms dealing primarily in produce shipped from Florida and California (oranges, cherries, lettuce, melons, etc.) gave low estimates. Almost all local produce brought to Boston is handled in the Faneuil Hall Market Area. During the summer and fall months, local produce accounts for a high percentage of the business done there, but as the local season declines, the dealers begin to handle more produce from outside of New England. Local apples, squash and potatoes are received almost every month of the year, as are hot-house grown vegetables.

#### Meat

The numerical comparison of wholesale meat dealers between Faneuil Hall Market Area (129) and New Market Square and vicinity (52) is misleading as an indication of the relative business volume of the two areas. The scale of operation done by firms in the two areas tends to be quite different. Of the 129 firms listed in the Faneuil Market Area, probably half are accounted for by the small firms in Faneuil Hall itself and Quincy Market building, and along Blackstone

and North Streets just north of Dock Square. These firms supply restaurants, hotels, and retail markets with meat and they also sell meat to retail customers. Mr. Galvin, the Superintendent of Markets for the city, felt that retail sales constitute a fairly small portion of the business done by these dealers, but perhaps, like the produce sold by the push-cart operators, it is a very important portion. There are also some large firms in the area, such as Handschumacher and Company, Inc., on North Street, and the firms occupying the Clinton Market Building between Clinton and South Market Streets.

The history of the meat dealers displaced by the Central Artery construction indicates a difference in scale of operation. A survey of these firms<sup>1</sup> indicated a higher median number of employees (12.5) for firms which had relocated at New Market Square. The median number of employees of firms which relocated downtown was 7.5 employees. Presumably, operations in the new buildings at New Market Square are more efficient than in the Faneuil Hall Market Area so that the difference in terms of volume of meat handled would be greater than the difference in employees.

The factor behind the difference in the scale of operations between the two areas lies in the method of transportation and the way in which meat is handled. The vast majority of meat received in Boston arrives by rail. The dealer who does not have direct rail access is

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1. Thesis, James Saalberg, Dept. of City and Regional Planning, M.I.T., 1959.



at an absolute disadvantage because of the extra step required to bring the meat from a freight yard somewhere to his processing or storage rooms. The wholesaler-receiver at New Market Square can move the carcasses directly from the refrigerated car into his processing room by means of overhead tracks and rollers.

It is true that perhaps 2000 carlots of meat are delivered annually by the Union Freight Railroad, the principal receivers being the Quincy Cold Storage Warehouses, The Boston Sausage Company, and the dealers in Clinton Market. However, this accounts for less than ten per cent of the total receipts at Boston <sup>2</sup>. The dealers in Faneuil Hall Market Area without rail access must depend either on direct truck receipts from meat producing areas (this is estimated at less than twenty per cent of total receipts of meat at Boston <sup>3</sup>) or else purchase meat from direct receivers. As suggested above, most of the dealers in this category probably deal in sub-carlot quantities.

### Fish

Fish landings at Boston have declined steadily since 1947. This is largely because of a steadily aging fishing fleet which is not being replenished, despite a federal loan fund which has recently been made available for the repair and replacement of fishing vessels. Extremely high vessel insurance costs present another problem to the Boston fishing fleet.

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2. The total receipts of meat in Boston are unknown. Receipts in 1947 amounted to 25,000 carlots, including meat from animals slaughtered in Boston. The number of wholesale dealers has increased since then.

3. Estimate by a New Market Square dealer.

Fish landings are supplemented on the Boston market by fish landed elsewhere and shipped to Boston by truck. For example, during certain times of the year, large quantities of swordfish are landed in Canada. These are shipped to the Boston market. It is not known what percentages of the total whole fish received in Boston are represented in the so-called "Shippers Market". The main varieties of fresh fish in the shippers market were mackerel, halibut and swordfish. The latter are principally imported from the Canadian Maritime Provinces. Canada is also the largest supplier of lobsters and other shellfish to the Boston market, followed by Maine and Massachusetts. Generally, the shipped whole fish are handled by the same dealers who handle the local production. The shippers market is not thought to be declining as rapidly as have the annual landings at Boston, but it is also affected by the frozen fish trade which has been largely taken over by foreign producers. This refers to frozen packages of the "finished product", meaning ready for consumption, usually frozen fillets. United States imports of frozen fish fillets have been increasing every year since 1953. Imports for 1957 were 55 per cent higher than in 1953. Canada is the principal supplier, followed by Iceland. Trucks have replaced rail freight as the principal method of transporting fish to and from the Boston Market.

### Eggs

There are about 22 firms handling eggs in wholesale trade in the Faneuil Hall Market Area. These firms assemble eggs from production areas and re-sell these eggs in smaller quantities. The trend is for eggs to bypass the Boston Market, for these reasons:

1. More eggs are now candled and cartoned at country points,
2. The use of trucks for shipment allows eggs to be delivered at many points en route to Boston,
3. Many eggs are now delivered directly to chain stores and to other large receivers, Cooperative egg marketing facilities (e.g., Brockton, Springfield, Fitchburg) now assemble, grade and pack eggs for the retail market in the Boston area.

### Groceries

The assembly and distribution of groceries is now handled almost entirely by the chain stores or by direct delivery to retailers. This is made possible by the standardization of dry grocery products. The remaining wholesale grocers deal either in produce or in specialty items such as imported and domestic cheeses, olive oil, peanuts, coffee, tea, etc. These firms are concentrated in the Faneuil Hall Market Area.

TABLE I. NUMBER OF WHOLESALE FOOD DEALERS BY LOCATION AND TYPE OF COMMODITY-1959-BOSTON\*

COMMODITY	FANEUIL HALL MARKET AREA	NEWMARKET SQ. AND VICINITY	PRODUCE TERM. AND VICINITY	FISH PIER AND NORTHERN AVE.	OTHER BOSTON	TOTAL BOSTON	OTHER METRO.
FRESH FRUIT AND VEGETABLES	110		40(30+10) <sup>1</sup>		11	161	24
MEAT AND MEAT PRODUCTS	129	52(42+10) <sup>3</sup>			21	202	27
FISH	34(13+21) <sup>2</sup>			55(44+11) <sup>4</sup>	8	97	238(State)
POULTRY	32(6 also meat)	2			23	57	51
EGGS	22(3 also poult)				7	29	25
DAIRY PRODUCTS	2(poult.+eggs)				1	3	-
DRY GROCERIES	28(1 also prod.)		10(8+2) <sup>5</sup>		23	61	16
TOTAL	357 -12(counted twice) <u>345</u>	54(44+10)	50(38+12)	55(44+11)	94	610	-

1. 4 of the 10 firms in the vicinity of the Produce Terminal are listed at the address of the Fruit Auction, 145 Northern Avenue
  2. 13 firms on Atlantic Avenue between T-Wharf and Commercial Wharf; 21 firms distributed throughout the Faneuil Hall Market Area
  3. 10 firms in the close vicinity of New Market Square
  4. 11 firms in the close vicinity of Fish Pier, mostly Northern Avenue
- \* Sources: Yellow Pages - Boston New England Telephone and Telegraph Company  
Wholesale Dealers in Fishery Products, Mass. 1959 Bureau of Commercial Fisheries, U. S. Dept. of the Interior

TABLE II. FRESH FRUITS AND VEGETABLES \*

## 1947 RECEIPTS - CARLOTS

	RAIL	TRUCK (DIST.)	TRUCK (LOCAL)	TOTAL	PURCHASES OTHER DEALERS	TOTAL SALES
CHAIN STORES	6750	840	1140	8730	2270	11,000
FRUIT AUCTION	5600	-	-	5600	-	5 600
PRODUCE TERM.	21048 <sup>4</sup>	-	-	21048		
WATERMELONS						
POTATOES	7000 <sup>5</sup>	-	-	7000	12675 <sup>3</sup>	60 045
GRAPES, JUICE						
FANEUIL HALL AND OTHER	71900 <sup>7</sup>	67560 <sup>6</sup>	9860 <sup>2</sup>	19320		
TOTAL	42300	8400	11000	61700	14945	76 645

1. includes receipts by truck from markets in other cities
2. includes direct sales by farmers in Faneuil Hall Market Area
3. includes purchases at Fruit Auction
4. from Produce Terminal Records
5. estimate - 4 yr. average (1955-58) Rail Receipts - Boston (These items sold from yards)
6. this figure corresponds approximately (slightly high) to the Atlantic Ave. estimated unloads of produce by the Union Freight Railroad
7. includes wholesale dealers in Charlestown, South Boston, Dorchester, etc. Numerically, these "other" dealers represent 20 per cent of the category "FANEUIL HALL AND OTHERS"

\* Source: Except as noted, The Wholesale Produce Markets of Boston, Mass., U.S. Dept. of Agriculture, Production and Marketing Administration, Marketing and Facilities Research Branch, Washington, D.C., June, 1950.

TABLE III. PRODUCE. RECEIPTS - FRUITS AND VEGETABLES - 1957

(Carlots)

	RAIL	TRUCK	TOTAL
CHAIN STORES			17000 <sup>5</sup>
FRUIT AUCTION	(4000)	(531)	4531 <sup>1</sup>
PRODUCE TERMINAL	12111	3651	15762 <sup>2</sup>
WATERMELONS			
POTATOES	8669	x	8669 <sup>3</sup>
GRAPES, JUICE			
FANEUIL HALL	1750 <sup>8</sup>	11500	13250 <sup>6</sup>
OTHER			3000 <sup>7</sup>
TOTAL			62212
ACTUAL TOTALS(USDA).	28125	22459	50584 <sup>4</sup> (90-95 % Accurate)

1. The Boston Market (3.) The Fruit Auction - New England Extension Services' Marketing Education Program - 1957
2. The Boston Terminal Markets - records
3. From Unloads of Fresh Fruits and Vegetables - Boston, Mass., 1957. U.S.D.A., Agricultural Marketing Service.
4. ibid
5. estimate: 1/3 of Total (John E. O'Neill, U.S.D.A.)
6. estimate: local produce (5302 carlots 1957) is equal to 40 % total at Faneuil Hall Market Area
7. estimate: 20 % of "Faneuil Hall" and "Other"
8. estimate: by Union Freight Railroad 30 - 40 carlots produce per week

NOTES - Accounting for total higher than actual total

- Chain Stores: All of their receipts may not be included in Unloads - Boston, Mass.
- Both "Chain Store" and "Faneuil Hall" and "Other" categories may include purchases from other dealers, i.e., majority of Fruit Auction receipts are sold to other dealers in less than carlot quantities.
- "Watermelons, etc." All of the rail receipts of these items are not necessarily sold from the railroad yards. Some are delivered to Produce Terminal and are therefore counted twice.
- U.S.D.A. figures for Unloads - Boston, Mass. are not complete.

TABLE IV. UNLOADS - FRUITS AND VEGETABLES BY STATE OF ORIGIN \*

	1956		1957		1958	
	Rail	Truck	Rail	Truck	Rail	Truck
MAINE	3862 <sup>*1</sup>	2612	5832 <sup>*2</sup>	4761	2512 <sup>*1</sup>	4573
MASS.	-	5270	-	5184	-	5343
NEW HAMPSHIRE	-	353	-	408	-	391
RHODE ISLAND	-	246	-	157	-	125
VERMONT	-	24	-	27	-	19
SUB-TOTAL	3862	8505	5832	10537	2512	10451
TOTAL ALL STATES	27709	21027	28125	22459	23567	23168

1. All Maine Rail Unloads are Potatoes

\* Source Unloads of Fresh Fruits and Vegetables - Boston-U.S.Dept. Agriculture, Agricultural Marketing Service

TABLE V. RECEIPTS OF PRODUCE BY RAIL AND TRUCK AT BOSTON PRODUCE TERMINAL\*

	RAIL	TRUCK
1947	21048	-
1948	19516	-
1949	17754	-
1950	16896	-
1951	16137	-
1952	16764	-
1953	15754	889 (Trucks were not
1954	13186	2681 admitted prior to
1955	13618	2403 1953)
1956	12778	3324
1957 <sup>1</sup>	12111	3651
1958	11483	3458
1959	10983	3406

1. Figures for 1957, 1958, and 1959 supplied by Boston Market Terminal.

\* Source: The Boston Market (1) "The Produce Terminal"- New England Extension Services', Marketing Education Program, 1957.

TABLE VI. BOSTON UNLOADS - FRESH FRUITS AND VEGETABLES * - FOR THE PAST TWELVE YEARS (Carlots)												
	1958	1957	1956	1955	1954	1953	1952	1951	1950	1949	1948	1947
RAIL	23567	28125	27709	28942	28289	28818	29001	28127	27961	27921	34267	38561
TRUCK	23168	22459	21027	18337	21034	19603	17451	17534	15698	15417	13010	10792
TOTAL	46735	50584	48736	47279	49321	48426	46454	45661	43659	45338	47277	49353

\* Source: Unloads of Fresh Fruits and Vegetables, Boston 1958 - U.S. Dept. Agriculture, Agricultural Marketing Service

TABLE VI-A. BOSTON FISH PIER LANDINGS * - 1947 - 1957 (in millions of pounds)												
	1958	1957	1956	1955	1954	1953	1952	1951	1950	1949	1948	1947
OFFSHORE	-	77	92	90	115	116	137	137	142	135	162	170
IN SHORE	-	59	55	47	37	36	36	33	28	37	37	31
TOTAL	124	136	147	137	152	152	173	170	170	172	199	201

\* Source: Landings and Prices of Fishery Products, Boston Fish Pier, 1957  
U.S. Dept. of the Interior, Bureau of Commercial Fisheries, Division of Industrial Research and Services, Market News Service



TABLE VII. VOLUME OF MEAT AND MEAT PRODUCTS SOLD AT WHOLESALE IN BOSTON BY TYPE OF HANDLER - 1947\*  
in carlots or carlot equivalents

TYPE OF DEALER	NUMBER	SLAUGHTERED IN BOSTON	RECEIPTS FROM OUTSIDE BOSTON RAIL TRUCK TOTAL	PURCHASES FROM OTHER DEALERS	TOTAL SALES
LOCAL SLAUGHTERERS	11	5000	500 - 500	0	5500
PROCESSORS	15	-	2965 35 3000	1025	4025
INDEPENDENT WHOLESALE DEALERS	63	-	5220 380 5600	3075	8675
HOSPITAL AND RESTAURANT SUPPLIERS	35	-	780 70 850	1460	2310
BRANCH HOUSES/SUBSID. OF NAT'L. PACKERS	8	-	6785 215 7000	130	7180
CHAIN STORE WAREHOUSES	4	-	2750 300 3050	1260	4310
TOTAL	136	5000	19000 1000 20000	7000	32000

\* Table 3 from ~~The~~ Wholesale Produce Markets at Boston, Mass. - Marketing and Facilities Research  
Branch  
Production and Marketing  
Administration  
U.S. Dept. of Agriculture -  
Washington d.c., 1950.

APPENDIX B

- I      ADVANTAGES AND DISADVANTAGES OF THE FANEUIL HALL MARKET AREA
- II     DIFFICULTIES OF MOVING THE MARKET
- III    THREE HORNS OF A DILEMMA

## I. ADVANTAGES AND DISADVANTAGES OF THE FANEUIL HALL MARKET AREA

The disadvantages of Faneuil Hall and vicinity as a location for the produce market are fairly obvious and have been well documented in various reports on the markets. Many of these disadvantages are inherent in the situation where market areas have survived and continued operation in their original sites, which were generally between the core of the old city and the wharves, and may be used to describe the ills of the old market areas of many older cities.

These disadvantages are principally: obsolescent and inadequate storage space, the difficulty of quality control, inefficiency due to the extra handling of produce made necessary by lack of rail access, general state of poor accessibility by either trucker or customer, and a localized situation of congestion in the streets of the vicinity which requires a simultaneous expenditure of time, energy and patience.

Many of the market buildings are four and five stories high. The top floors are of little use to the tenants. Originally these top floors were used for the storage of boxes and crates, dry goods associated with the marketing of produce. Now this is reputedly discouraged by the fire department (and perhaps the insurance companies). The handling of produce is complicated by the absence of truck-bed loading platforms. Produce must be brought from truck-bed level to sidewalk level and vice-versa. The shortage of first floor storage space requires the use of other floors, usually the basement, for the storage of produce. Vertical movement can be accomplished by inclined rotary belts, but this still results in increased costs and use of

labor. Adequate temperature control for ripening rooms (bananas), cooler rooms (apples, potatoes, etc.) and freezers (meat, poultry) is also lacking in many of the older markets. (At the same time, however, the installation of refrigerating and cooling systems and storage rooms represents one of the major investments in the existing market sites.) The Quincy Cold Storage and Warehouse Company provides refrigerant as well as actual cooler and freezer space for many of the markets in the vicinity.

Quality control refers to the least possible damage or loss of quality to produce passing through the market due to handling and storage. Extra handling and improper storage conditions both obviously contribute to a decline in quality and appearance of produce. The dealers themselves readily admit that the sanitary conditions in the Faneuil Hall Market Area are less than ideal.

Physical separation of the market from the major rail terminal causes a certain amount of extra handling of produce. To some extent though, this is caused by the scale of operation of many of the jobbers and small wholesalers. The dealers who are not direct receivers would have to buy from the receivers and this would require a certain amount of handling regardless of their location. Even dealers who are themselves direct receivers buy and sell among other receivers and jobbers. This extra handling is more a function of the complex merchandising pattern than of physical separation between two areas. Of course, the distance that the produce must be transported between receiver and wholesaler is reflected in loss of time and the necessity of maintaining perhaps additional trucks, but the major step in terms both of

quality control and expense is the loading and unloading maneuver. And this is not particularly a disadvantage of Faneuil Hall, but is a disadvantage of the traditional processes as compared with the combination of steps exemplified by chain store operations.

The construction of the radial-concentric highway system planned for Boston would make downtown Boston much more accessible by truck to both the metropolitan area and the major regional highways than it has been in the past. The rail accessibility of Faneuil Hall is a disadvantage although even this has been lessened due to the increasing use of rail transport for the shipping of produce. Such a trend, however, has not developed in the transport of fresh meat and undoubtedly the lack of rail access is a serious disadvantage to meat dealers and to large-scale wholesale operators of all kinds.

Congestion has always been extremely severe in the Faneuil Hall Market Area (to judge from early photographs showing North and South Market Streets jammed with horse-drawn wagons). It is especially bad when market traffic overlaps with morning rush hour traffic and seriously lessens any advantage gained from its central location.

Chief advantages of the Faneuil Hall Market Area are its central location, relatively low rents, and the fact that traditional marketing channels still terminate and begin there.

There are incidental advantages vis-a-vis existing competing market areas. There is no \$18 per truck unload charge at Faneuil Hall as there is at the Produce Terminal, nor are dealers at Faneuil Hall obliged to hire Union help as are dealers at the Produce Terminal.

Also, dealers at Faneuil Hall enjoy the fringe benefit (unimportant to their larger competitors) of being able to supplement their whole-sale sales with retail sales through the push-cart market or across the counter.

The consensus of market operators seems to be that the chief advantages are the low rents and the possibility of capitalizing further on existing investments, and a certain strong prevalence of existing marketing patterns.

## II. DIFFICULTIES OF MOVING THE MARKET

The basic equation in considering the feasibility of moving the market to a new location is the one which pits savings accrued from the increased efficiency of handling, access, etc., which would be possible at a new market against the increased rent and overhead which would be charged for the new facilities. Once this equation has been worked out to the satisfaction of engineers and economists, the market operators themselves must be convinced of its relation to reality. The 1950 Report of the U.S. Department of Agriculture on the Boston Wholesale Produce Market <sup>1</sup> recommended that the entire market, totaling 460 store units, be moved to a 125 acre site in South Bay between Southampton Street, the New Haven Railroad Yards and the Fort Point Channel, which would be filled and included in the 125 acres. Primarily, on the basis of this report, the Massachusetts Market Authority held public hearings with the market operators to determine the willingness of the operators to move to such a proposed market site. Despite the sincere efforts of many men associated with the markets to bring about the creation of a new market area, the majority of the operators were cynical about the amount of money they were told they would save at the new location. As one operator put it, men who had never earned over \$4,000 or \$5,000 a year were told that they would save several times that much money by moving to a new location. The arguments put forward by the Market Authority were not sufficiently

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1. The Wholesale Produce Markets at Boston, Mass., U.S. Department of Agriculture, Production and Marketing Administration, Marketing and Facilities Research Branch, Washington, D.C., June, 1950.

compelling to convince the market men themselves. Some of the operators asked the Authority to re-study the plans and costs in an effort to cut the estimated rents which would be necessary to finance the project. The Authority was unable to lower its estimates of the necessary rents and interest in the new market died at that time.

In 1952, the feasibility of the new market was re-studied by the consulting engineering firm of Coverdale and Colpitts who also found that the project was feasible and conducted polls to show that the majority of market operators would be interested in moving to the new location at the rent schedule developed by Coverdale and Colpitts. Again, nothing came of the proposal.

It may be concluded from this experience that (1) a certain cynicism or pessimism exists on the part of the market operators over the savings which would be realized by modern facilities, or, to put it another way, the rents which they could afford to pay for such facilities, but (2) that, academically, at least, they would be interested in moving to such facilities if the rents were low enough.

The pessimism of the market men is somewhat legendary. The Massachusetts Department of Agriculture market reporter related an anecdote told by his previous boss. When he first came on the job thirty years before, the market people had all said business was lousy, and every year after, business got worse. But thirty years later the market was still there and active.

It is known that the volume of produce handled by the Boston market has declined during the past twelve years. The wholesale grocery



dealers and wholesale egg dealers have been reduced the most, due to changes in marketing techniques, while fruits and vegetables handled in the market have declined slightly. The lack of enthusiasm over new investment is understandable in a business which has been suffering declining vigor for a considerable period of time.

The consensus today of people associated with the market is that the optimum time for moving the market has passed. The principal reasons for this view are: increased construction costs, the decreasing availability of suitable sites (considerable construction, including the Southeast Expressway and the plants of many wholesale meat dealers and processors, has occurred in the South Bay since the 1950 report <sup>2</sup>), and the declining vigor of wholesale trade in produce.

A significant change in the situation today as compared with 1950 has been the move of the major wholesale meat dealers to New Market Square. The wholesale meat market represents the only portion of the market which has grown during the intervening years - primarily because, rather than being bypassed by the chain stores, the chain stores have become the principal customers of the meat dealers. This move reduces the pressure for a new combined market.

The larger fruit and vegetable dealers in the Faneuil Hall Market feel that they too would benefit by a move to more suitable facilities, but they realize that no move is possible unless a majority of the firms move at once. This does not seem likely. In the meanwhile, some firms at Faneuil Hall have made additional investments in their old locations which they would have to recover should they abandon those locations

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2. Recently a site in this area has been studied for the new football stadium.

### III. THREE HORNS OF A DILEMMA

The markets are faced with three unsatisfactory alternatives. To stay in their present locations is to continue to operate under the burden of inefficiency and less than ideal storage facilities. With such a burden, they are two-time losers; they lose from the cost of extra labor and from the loss of quality in the produce. However, to move to an entirely new market location requires, first of all, a faith in the future, which is not one of the outstanding characteristics of the wholesale produce trade, and a degree of cooperation which is also traditionally foreign to these individualistic enterprises.

Secondly, such a move would require an investment in fixed overhead which the average operator is not convinced can be recovered in savings due to increased efficiency. Due to the marginal nature of many of the firms and the slightly declining volume of food passing through the market, such a move would be likely to result in an immediate consolidation and shrinking of the market. The larger and more efficient dealers would take over the majority of the business, with a corresponding high mortality rate among the smaller (and more marginal) dealers.

The remaining alternative is for the market to remain in its present location and for the dealers and owners to attempt to renovate their buildings and install the necessary facilities to overcome inefficient and unsanitary conditions. Of course, the reluctance to invest in fixed overhead charges that applied to the move to a new

location would apply here as well. There is the one advantage, however, that by staying they can continue to capitalize to some extent on past investments in cooler rooms, refrigerator systems, etc., and whatever good will that they have built up at their present locations. The consolidation and shrinkage predicted in the event of a mass move to a new location, undoubtedly is occurring, although more slowly, at the present location. (A comparison of the number of wholesale market operators over the past twelve years would not indicate, however, with the exception of wholesale grocers, that this process is occurring as rapidly as one would conclude from conversations with market operators.) The larger firms, especially if they own the buildings that they occupy, show some willingness to invest money in improvements in the area. Landlords, perhaps due to fairly high property evaluations, are apparently less interested in making any additional investment in market property and are thought to dream of "higher" uses for their property. What the city will or can do to improve circulation and congestion remains to be seen.

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